

Council by Size Notes



Council by Size – Large

Diversity

Boston EPC – Diversity and Inclusion Committee – they have a gap between the ethnic make-up of the professional and the community, and go speak to University students about their career path in estate planning.

Cleveland EPC – Mentorship Program

Detroit EPC – case study with urban college

- Do big firms have diversity programs and can EPCs work with them?
- Is gender an issue – not typically for large councils
- Diversity of disciplines – important for councils that they are attorney heavy - some councils have ceilings in each discipline
- How do you handle multi-disciplinary members? Members need to be properly categorized for member directory.

Membership / Growth

- Councils growing by a “smidge”.
- FSP and NAIFA membership has been down-trending. Most local NAIFA chapters have folded into the state organization.
- Board must invite a guest to each meeting (member prospects).
- Members must bring prospective guests to one meeting / year.
- Traditional companies are no longer paying for council memberships.
- All councils have the requirement of sponsorship by a current member.

Baltimore EPC – members must attend 1/3 of the meetings or pay a reinstatement fee

Seattle EPC – lifetime membership for past presidents

Detroit EPC – They have other categories/ancillary service memberships – Associate Members. They cannot vote or be officers. Their attendance at meetings is a function of the speaker. They also have Valuation Services Professionals. They had 32 sponsors and co-sponsors for their lunch ‘n learn series (\$1,500/year).

Central PA EPC – Members are encouraged to bring a guest, member gets a free meeting and guest is put in a drawing for a free membership. 50% of these guests end up renewing their membership.

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Chicago EPC – offers a retiring membership at 1/3 of the full membership cost.

Central NY EPC – New members pay a \$75 initiation fee. Emerging Professionals pay ½ of the full membership fee.

Membership Application

Only council using online application is Baltimore EPC.

Someone asked if it was possible to have members pay the application/membership fee at the time of application submission, instead of after they are approved. If they are not approved, they could be refunded.

Programming / Services

- Primarily a member services organization with a secondary goal of public education.
- Consumer-focused outreach: programs at senior centers (4-5/year), promoted by facility.
- Community outreach committee.
- Insert in the community newspaper.
- Basic Education – for the public pieces on NAEPC.org.
- Plan at least one fiscal year in advance.
- Partnership with universities.
- Bus tour through city, and at downtown venue – speaker about general topic – include spouses.
- Joint event with another organization – share mailing list by only providing mailing labels.
- Panel discussions rather than individual speakers.
- Popular topics include: diminished capacity, asset protection for significant others

Central AZ EPC – emerging partners program

Baltimore EPC – emerging partners program

Detroit – Lunch ‘n Learn Series and members teach at a local CFP program. Have a social event in July. Hold education events that are community-centric. Destination venues for events that are heavily subsidized by sponsorships.

Seattle EPC – Quarterly dinner meetings and 2-day fall symposium. Topics are a mix of technical and non-technical. They have panel discussions with individual professionals from all aspects of the topic.

Atlanta EPC – Members are speakers or they provide recommendations of speakers.

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Member Benefits

Long Beach EPC – One of their member benefits is that annually, they bring in a photographer to update member headshots.

Palm Beach County – new member spotlight on social media.

Speaker Topics / Recommendations

Topics: 199A

Recommendations: Steve Akers, Sam Donaldson, Ron Aucutt, Marianne Jennings, Carly McCaffery (New York), Stacy Eastland

- If there are speaker cancellations, have a member fill in or show a NAEPC webinar.

Social Media

- Operative word in social media is not media.
- Use demographic parameters when using Facebook ads.
- Someone asked if the conference had a hashtag.
- HootSuite – social media management platform – lets you choose how often you post and if you auto schedule, the software sends posts at optimal time for your followers.

Palm Beach County EPC – They have a communication committee.

Board Management

- Events Committee – encourage the committee to take a strategic role, letting administration handle the details.
- Roles and responsibilities are distributed at the beginning of the board year with the Board, Committee Chairs and committee members.
- Succession plan for Board – if not moving up to EC, commitment is 2 years.
- Welcome meeting at beginning of year with all new members.
- Board orientation through email, offer phone call, follow-up in person.
- Membership survey – use this to guide what the strategic plan will be for the next 3-6 years.
 - o What value do you see in being a member of this organization?
 - o Schedule to deliver survey immediately after a meeting ends.
- Surge – associationsuccess.org – provides free webinars for association management.
- Admins – there was discussion about having a LinkedIn group or a place to share documents, and possibly holding a conference call to discuss.

Your intrinsic value correlates to the magnitude and size of the problem you can solve.

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