

Council by Size Notes



Council by Size – Medium

Participation and Membership

- Promote continuity – ask each person in attendance to go back and continue to encourage others to attend.
- Committee is formed by one person from each discipline. The committee identifies ways to get more members, not approve membership. They have a new member mentorship program. They changed their bylaws from 5 to 3 years of experience for Associate members, who are students and recent graduates.
- Emerging Professionals
- Universities as members
- Allied professionals
- Student membership from local law school
- Retired membership is \$100 versus \$325, but those members pay for events.
- Identify new CPAs through Personal Financial Specialists of AICPA.
- Emeritus members
- Expanded bylaws to include wealth managers, etc. In the category of Trust Officers.
- Read membership applications and bylaws from other councils to learn what they are doing, and revised theirs based on that.
- Hold a new member breakfast.
- Scholarship program for young attorneys.
- Follow up with people after events.
- Welcoming committee – made the group seem so much friendlier – composed of some new members as well as the entire board.
- If someone brings a guest, they can get a raffle ticket to win a prize.
- Everyone is looking for younger members, and have the opportunity to find them with sponsorships.
- Young professionals group meets independently.
- New members (membership the first 5 years) are not charged membership dues the first year, and are then charged only half for the other four years (split with a sponsor).
- Board is asked to bring in 2 new sponsors each year.
- Programming can include a speaker and a zipline sponsor – sponsor talks about an estate planning subject from the sponsor perspective.
- Award of Excellence encourages new applications and provides a benefit.

- **Spokane EPC** – guests are charged \$65. Three new members join each month. Have sponsors from different disciplines.

- **Long Beach EPC** – 3 types of membership:
 1. \$250 – regular membership with 5-years experience,
 2. \$250 – associate membership sponsored by a current member, and
 3. \$500 – corporate membership – can send 2 people who are not members to meetings (most have a regular member with an opportunity for their associates to also attend).
- **Red River Valley EPC** – CE attraction
- **Boston EPC**- Haven't focused on marketing efforts, but have recently hired a marketing professional that will be communicating with members as well as the community
- **Central Texas EPC** - Welcome new members; Free dues if you sponsor a new member; Round tables; Having an engaged board is key; Utilize website for speakers
- **Santa Clara / Silicon Valley EPC** - Topic drives attendance; Webinar seminars

Programming

- Survey members and listen to them.
- Case studies from NAEPC
- Webinar followed by discussion.
- Webinars convert to podcasts
- Getting away from technical topics.

Hot Topics:

- Cryptocurrency
- Embryo ownership
- Family governance
- College planning options
- 529 planning
- Geriatrics / MD talking about when your clients start to dip.
- Partner on site at a hospital site to get in front of the group.
- Joint meetings with regional
- Family wealth

How do we get people engaged on social media?

Washington DC EPC

- Board took responsibility for posting weekly information
- They dropped Facebook, as it was more social.
- They are still on LinkedIn

Rockland County EPC / Delaware County EPC

- Get young people involved in social media.
- Make it look attractive.
- Have a member spotlight – new member introduction in newsletters, and transfer this information to social media.