



National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

**EVERY
COUNCIL
CAMPAIGN**
Program Outline
&
NAEPC
Commitment

The Association of Choice for Estate Planning Professionals



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January 1, 2014

Esteemed Council Leader:

The National Association of Estate Planners & Councils is continuing the “**EVERY COUNCIL**” campaign this year – an initiative to facilitate a complete network of all estate planning councils throughout the country. The leaders of our approximately 250 affiliated councils have asked how they can best have information distributed directly to *their* members describing the many programs, services, and benefits of council affiliation with the NAEPC. More importantly, at the November 2007 annual conference, representatives of several councils complained that their members were not receiving the information that the NAEPC had been sending to the local leadership.

We write today to request your participation. We sincerely hope that after reading this letter you will be encouraged to provide to the NAEPC administrative office a roster of your entire membership so that we may reach them in the manner described within the attached pages. We understand this is a decision that must be supported by your board of directors, that it may take time, and questions may arise. Please contact Eleanor M. Spuhler at (866) 226-2224 for answers to any questions you may have.

Before reading further, we ask that you take a moment to review our privacy policy found online at <http://www.naepc.org/privacy.web>. We have carefully created and formally adopted this policy with your council and its membership in mind. We give you our absolute assurance that the NAEPC will never make your personal information available to anyone outside of the NAEPC, nor will we ever sell it. We are simply asking for permission to reach your membership via e-mail six times per year with our e-publication, *NAEPC News*, and make contact once per year via U.S. mail with the brochure for our highly-regarded annual conference. Please view the enclosed page for more details about the contents of *NAEPC News*. As a leader at the local level, you have most likely seen this publication in the past.

Please discuss this with your members and then have your board take action so your council and its members do not miss the progress being made to help your members in their professional endeavors. On behalf of the entire NAEPC board of directors, I thank you for your consideration.

With best regards,

Gregory E. Sellers, CPA, AEP®
2014 President

Enclosures

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EVERY COUNCIL CAMPAIGN

Program Outline & NAEPC Commitment

Program Outline

- An e-mail point of contact up to (and not exceeding) six times per year
- Only *NAEPC News* or an annual conference registration brochure (hard copy) will be sent via U.S.P.S. mail
- *NAEPC News* will only contain the following items of interest:
 - Information about existing and new member benefit discount programs (a current list can be found on the “Member Services” page of www.naepc.org)
 - Information about the NAEPC’s annual conference, both the two-day educational program and Council Leadership Day activities
 - Information about the two NAEPC-Administered professional designations (Accredited Estate Planner® & Estate Planning Law Specialist)
 - Councils and/or members in the news
 - Items of interest to council leadership and members

NAEPC Commitment

- To strictly adhere to our privacy policy
- To respond to all notices of suspected misuse immediately with a full investigation
- To offer **every member of every participating council** an opportunity to “opt out” in a manner that will not impact the communication from the leadership of the affiliated local council
- To offer each participating council an opportunity to “opt out” each calendar year with a statement in the annual dues notice
- To offer each new council an opportunity to choose whether they will take part in the program
- To offer each non-participating council an opportunity to participate each calendar year with a statement in the annual dues notice

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EVERY COUNCIL CAMPAIGN

Acknowledgment / Authorization

(Please complete and return via U.S.P.S. mail, facsimile or scan and e-mail.)

Council Name: _____

Please select one of the following options:

_____ Our Board of Directors **HAS** authorized the NAEPC to reach our members via e-mail up to (and not exceeding) six times per year with *NAEPC News*, the official newsletter of the NAEPC, and once per year via postal mail with the registration brochure for the Annual Conference. We understand we will be given an opportunity each year with the Annual Council Dues Notice to withdraw our permission. (Choose one of the options below to transfer data, please.)

_____ Our Council has a Level 2, 3 or 4 NAEPC-hosted website and we authorize the NAEPC to obtain the first name, last name, mailing and e-mail addresses for each of our members from that site.

_____ Our Council has a Level 1 Splash Page and I am e-mailing the first name, last name, mailing and e-mail addresses in an **EXCEL** file to admin@naepc.org. (Please include council name and your contact information in submission.)

_____ Our Board of Directors **HAS NOT** authorized the NAEPC to reach our members up to (and not exceeding) six times per year with *NAEPC News*, the official newsletter of the NAEPC, and once per year via U.S.P.S. mail with the registration brochure for the Annual Conference. We understand that we will be given an opportunity each year with the annual council dues notice to offer our permission.

Signature of Council Officer

Date

Printed Name of Council Officer

Position of Council Officer

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