

LEIMBERG INFORMATION SERVICES, INC. (LISI)

Fast, Frank, Incisive Analysis



WHY IS LEIMBERG ACCESS IMPORTANT TO YOUR CHAPTER?

Your members will have unlimited (24/7/365) access to Leimberg Information Services' huge data base of cases, rulings, legislation, and much more at www.leimbergservices.com

Leimberg Information Services (LISI) provides financial service professionals fast, frank, and incisive analysis of proposed and recent legislation, regulations, cases, and rulings by experts such as:

- Ron Aucutt the leader of McGuireWoods' private wealth services group, named 2012 "Washington, D.C., Trusts and Estates Lawyer of the Year" by *Best Lawyers* and author of "Top Ten Estate Planning and Estate Tax Developments of 2012"
- Bob LeClair, creator of Financial Planning Toolkit and author of *Tools and Techniques of Financial Planning*
- Jay Adkisson best known as the creator of Quatloos.com and as a book author and popular legal and financial speaker

LISI is also home to a very powerful engine that will help your members create customized searches and find information more easily and quickly than ever before possible.

Your estate planning council members will receive monthly email reminders that the Leimberg Information Service website is available through membership in your estate planning council.

Your estate planning council members will have - through your website - access to hundreds of cases, rulings and legislation LISI has already reported on - and access to those posted throughout the year on almost a daily basis. These commentaries are instantly accessible through LISI's incredibly powerful search engine that will allow members to create customized searches to locate specific topics, references, and citations of particular interest to them.

Other benefits include: twelve-year archive of monthly FaxNet data service and Section 7520 and other important rate information

▪ **Cost to NAEPC affiliated councils** ▪

To enroll in Jan., Feb., March, or April \$24/member

To enroll in May, June, July, or Aug. \$20/member

To enroll in Sept., Oct., Nov., or Dec. \$30/member *

*covers the last 4 months of the year and all of the following year.

ALL members of a council must be enrolled.

A list of members' email addresses must be submitted electronically in Excel to:
councilservices@naepc.org

LEIMBERG REGISTRATION FORM

Step I:

Council Name: _____

Number of Current Council Members: _____

Contact

Contact Information

First Last _____

Company Name _____

Address 1 _____

Address 2 _____

City, State Zip _____

Phone: _____

Fax: _____

E-mail: _____

Dues Worksheet:

\$24 x # of members in your chapter (*total current membership) = total due

* This is not negotiable.

TOTAL DUE: \$ _____

Payable upon receipt

Please make checks payable to: NAEPCC - or -

Charge my credit card \$ _____ MasterCard Visa American Express

Card Number: _____ Exp Date: _____

Signature: _____

Mail to: NAEPCC ▪ 1120 Chester Avenue, Suite 470 ▪ Cleveland, OH 44114

Fax: 216-696-2582

Step II:

Once you have submitted this form along with payment you will need to send the NAEPCC an Access or Excel spreadsheet including the following fields:

First name

Last name

email address

Please send this database to: councilservices@naepcc.org

NOTE: Payment will not be processed until the spreadsheet has been received.

After this form, payment and the database have been received and processed the NAEPCC will send you and your membership directions on how to access the Leimberg site and set up usernames and passwords. **The monthly reminders will be sent directly from Leimberg Information Services after the initial enrollment message.**

**Please be advised that members of councils that choose to cancel their subscription may receive a message from Leimberg Services with notification that the service is no longer available.*