



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

January 1, 2015

Dear Potential Value Partner:

Thank you for your interest in becoming a "Value Partner" with the National Association of Estate Planners & Councils! Our partners offer valuable programs and services to the association's designees, 260 affiliated local estate planning councils and their 29,000 members at reduced pricing.

Information on how to become a value partner can be found online at <http://www.naepc.org/membership/benefits/submit-benefit> and within this informational packet. Please contact our national office if you have questions prior to submitting your application.

For those companies / organizations that are submitting an application for a time-sensitive conference or event, please make sure to send your details for review no less than four months in advance of the event date. Although we'll review an application as it arrives, this four month window will allow ample time for promotion within our allowable forms of communication.

Speaking of allowable forms of communication, I would like to take a moment to outline how NAEPC works to "get the word out" about our value partners. The first action for an accepted benefit will be online placement within the sortable "member benefits" portion of www.naepc.org. This page also exists on the 150+ advanced affiliated local council websites (visit www.epccleveland.org for an example). The association publishes three newsletters regularly and information about all value partners is listed within each:

- *NAEPC News*, our most comprehensive newsletter, is distributed via email to approximately 17,000 enrolled members of affiliated local councils six times per year
- *NAEPC Minute*, our informational message for the leaders of the 260 affiliated local estate planning councils, is distributed monthly via email
- *AEP® Alert*, our publication just for Accredited Estate Planner® designees, is sent to the active population of 1,800+ six times per year via email

Please be advised that NAEPC must comply with its privacy policy and membership commitments. As such, we will only communicate benefits to the membership as outlined above and will not generate email to the membership outside of these guidelines. Additionally, value partners are not permitted to email any segment of the NAEPC membership directly (including council contacts) and are prohibited from harvesting contact information from our website or any affiliated council website.

The association has recently begun offering an "Elite Value Partner" status to those value partners that have been active with us for one year or more. Please see the final page of this packet for a brief outline of the program requirements.

Finally, I encourage you to consider having a presence at an upcoming annual conference. Your participation as a sponsor or exhibitor is just one more way to be in front of our members. Visit <http://www.naepc.org/conference> for more information about the annual conference and various opportunities.

Thank you for your interest in becoming a value partner, I look forward to welcoming you soon.

Sincerely,

Julie A. Buschman, CPA, AEP®
Chair, Member Benefits Committee

The Association of Choice for Estate Planning Professionals



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NAEPC Member Value Partner
Product Review Application

Date: _____

Product Name or Organization Name:

Contact Person: _____

Address: _____

City, State & Zip: _____

Phone: _____ Fax: _____

Organization Website: _____

Email: _____

Please complete the following...

Our product or service best fits the following category(ies):

- software related to estate planning
- conferences, seminars, webinars and other educational opportunities (must supply complete registration brochure/program information and complimentary admission in order for committee to review)
- books, magazines and other publications related to estate planning
- industry-specific information related to estate planning (example: software specific to attorneys)
- programs and services appropriate for council development (example: Konica / Minolta)
- marketing and website design services
- other – please explain _____

Please explain the discount being offered to NAEPC members with a notation of how the discount compares to relationships with other professional organizations (if applicable) _____

Please explain how the ordering process will be handled, include information about whether an online ordering system will be made available, etc. _____

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Please list any additional details about the program or company you feel will be helpful for the committee review process: _____

How long has your company been in business? (18 months or more required at the time of application) _____

By completing this application and returning it to the NAEPC office, I understand that...

- the product must be discounted specifically for the NAEPC and the cost should be less or equal to other benefit programs by the same company
- company must provide the NAEPC with a 1 – 3 paragraph description of the program that will be posted on the NAEPC website and used in NAEPC newsletters
- company agrees to provide NAEPC with one copy of the program materials and brochure, one complimentary admission to event/conference and one complimentary membership if benefit is a program or service with annual or monthly fees
- company must provide the NAEPC with an online order form or other appropriate procedure for placing orders
- company will provide the NAEPC with a letter if the benefit program is discontinued or discount level is changed
- if accepted, Company will not use the word “endorsed” on any website, brochure or materials associated with the product or service
- if accepted, Company agrees to provide NAEPC with a copy of any printed materials prior to printing or distribution of same
- company understands that the NAEPC’s distribution to the membership of the affiliated local councils is limited to up to six times per year and that NAEPC will not provide a mailing list of council contacts or council members
- company understands that they are not permitted to harvest member contact information from www.naepc.org or the membership roster of any affiliated local council website
- company understands that all benefit partners will be asked to participate in a yearly review procedure

Signature _____ Date _____

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“Elite Value Partner” Criteria

This Elite Value Partner program offers existing value partners an opportunity to support the association and its membership in an advanced manner and, in return, offers expanded recognition. Please read on for more information.

Program Requirements ·

- Have been existing value partner for one year or more
- Participate in 2 or more consecutive annual conferences at the entry level sponsorship of \$2500 or aspire to a greater level of support
- Participate in yearly benefit review process
- Participate in royalty program with NAEPC *or* offer NAEPC membership a discount greater than any other available offers to professional associations

Benefits to Value Partner ·

- Special recognition on www.naepc.org in member benefits section
- Enhanced publicity at annual conference attended by nearly 400 affiliated local council leaders and practitioners yearly
- Special mention in *NAEPC News* and *NAEPC Monthly Minute* newsletters*
- Offered as a featured benefit in no less than one *NAEPC News* newsletter per year
- Included in yearly mailing to NAEPC-affiliated local councils
- Inclusion on Elite Value Partner slide of NAEPC council recruitment presentation

Your organization may contact the association for an application if, after one year of participating as a value partner, you wish to become an Elite Value Partner. Information about the program will also be included in the yearly review mailing.

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