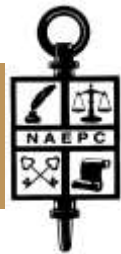


# Learning Pod Notes



## Member Milestones

How large you are as a council does matter in terms of attracting and retaining new members.

Suggestions:

- Congratulating members of councils that reach membership milestones
- Creating an award / special gift / ribbons to nametags
- A special event where long-term members are recognized

Some councils mentioned that they can have members without those members paying dues. They just have to pay for an event.

## Membership Types:

Emeritus membership – minimum of 5 years

## Awards:

Member Milestones Programs / Achievement Award

Lifetime Achievement Award - practicing for a minimum of 15 years and a member of the council for at least 5 years

Service and achievement awards

Distinguished Estate Planner award – advertise and promote the award. They are nominated by a member, but a committee makes the final decision. A lot of attorneys have received the award.

Annual award event – very popular with sponsors.

President's Award – someone did something important within the last year. It's a way to honor the younger members.

Exceptional Service Award – not a lifetime award, but has become something of significance within the past two years.

Boston EPC – Josh Miller changed name of the award to Excellence in Estate Planning rather than the Distinguished Estate Planner. Individuals must be nominated for this award.

Council Leadership Day – November 6, 2018

55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

Since 2001, Distinguished Estate Planner Lifetime Achievement Award – membership in council for 5 years, 15 years in practice of estate planning, showing leadership, speaking engagements and community service.

150 people have come to the awards luncheon, which is sponsored and now so popular that they now use a lottery system.

A separate committee chaired by the outgoing President oversees the nomination / awards process.

VP of council is the co-chair of the award committee.

One council said they have a lot of older members, and it would be nice to recognize them, in hopes that they would maintain membership longer.

Since 2008 – Exceptional Service Award – look back at the past two years, advocate legislative service within the council. This award is not limited to one, so there can be two, but some years have none.

Stanislaus County EPC – they have a member of the year, which is generally a former board member. They also have a summer social to present the award and bring in new board members.

Older members are able to sponsor events

Annual sponsors and gala sponsors.

Fall and holiday mentoring events.

Members like to be recognized.

Recognition at an event.

Member spotlight.

New members get a red badge, encouraging the other members to say hello.

Could use a survey to find out when members joined.