

COUNCIL LEADERSHIP DAY SHARING SESSION NOVEMBER 15, 2016

Council Size: Large Councils
Facilitators: David Dembert & Stephen Thaler
Number of Attendees in Session: 15

Goals for the session were identified as discussion with regard to:

- Membership growth
- Engaging younger members
- Diversity
- Programming
- Social media
- “Out of the Box” ideas
- Communication
- Sponsorship

MEMBERSHIP GROWTH & RETENTION

Members are often permitted to invite guests to meetings.

A new member social is sometimes held.

Some councils conduct a phone interview with potential new members.

A bi-annual membership drive occurs within one EPC. In this council a new member must have 2 referrals who have each known the applicant for at least 2 years.

In some councils the board is required to nominate at least 1 new member each year.

Councils reviewed their structure:

- \$120 plus \$50/meeting (must attend at least 2 meetings)
- \$250 includes 7-8 lunch meetings
- \$400 includes 4 dinner meetings
- \$450 includes 5 dinners, 2 socials and 4-5 emerging planner events
- \$170 includes 9 lunch meetings
- \$150 includes 3 lunch meetings, 1 dinner and 2 socials
- \$100 plus \$60 per quarterly dinner meeting

Student scholarships that cover the first year of membership were offered as an idea to support the engagement of younger members.

PROGRAMMING

One EPC hosts an “estate planning seminar”, which is a large event that subsidizes the organization and quarterly meetings

Breakfast meetings can sometimes be held with other councils or include entry-level topics.

Sponsorships were encouraged to allow for speakers of higher notoriety.

Lunch and learn events were mentioned as popular, possibly hosted with other organizations.

Many councils present have day-long events with notable figures in the estate planning world.

Continuing education credit was noted as being problematic in some cases.

Hot topic idea: "Inside the Head" where one seasoned member interviews another to discuss their career and its path, "Docket Call" day-long event, local economists, holistic estate planning, etc.

FINANCIAL HEALTH

It was noted that it is desirable for programs to cover costs, either through sponsorships or otherwise. The use of sponsors to cover speaker fees or bring speakers in was also heard.

The use of multi-year sponsorships is often also employed.

LEADERSHIP & COUNCIL MANAGEMENT

It was noted that it is often difficult to get traction with member use of social media like LinkedIn.

One EPC present promotes the AEP® designation at every membership meeting and has a special informational session. All executive committee members have been encouraged to attain the designation.

CONSUMER OUTREACH

One council publishes an estate planning supplement in their local business journal.

One EPC has a community outreach committee that visits senior living communities to help residents navigate the complex estate planning issues.

BEST IDEAS WRAP UP

- The creation of an "emerging planners" group
- Minimizing the use of social media
- Non-technical topic events
- The use of local firms to identify younger planners, incorporate scholarships where possible
- The creation of a "super committee" of local organizations to foster cooperation among sister organizations
- Rotating venues to encourage attendance
- Entry-level topics to engage younger members
- Adding networking time before meetings