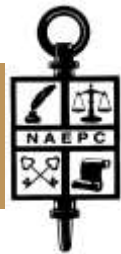


Learning Pod Notes



NAEPC Benefits Review

Websites

- Problem – free for members / prepaid, and paid for guests

Speaker

- no fee / for a fee
- limited knowledge of Speaker Bureau

Webinar – brown bag lunch, can always use these as backup for an emergency

Discounts – with partners and Trust and Estates

Journal

- promote it
- can ask for original articles
- 50,000 visits per issue

Leimberg Service

Bylaw Review

AEP

- Council nomination
- AEP promoted to the public with articles in business journals
- AEP chair can speak at events and promote the concept

New / Young Members

- Invited to all lunch meetings
- Board is at ever meeting, recommending new members
- Have a meeting each fall and bring a guest
- Senior partners suggest members bring a young partner or associate
- Ask a senior partner to bring a diversity/inclusion prospect
 - o Handicapped
 - o CFP has an African-American SI Group
 - o ABA does a lot within the diversity initiative
- Mentor program
- Sponsors bring younger associates

Council Leadership Day – November 6, 2018

55th Annual NAEPC Advanced Estate Planning Strategies Conference

Web feature – now can text

Suggestions: Having a liaison from NAEPC at Regional Leadership Days; PowerPoint re: benefits of NAEPC