

The NAEPC Education Foundation National Estate Planning Awareness Week

2015

Guide to Planning a Community Outreach Event

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The Association of Choice for
Estate Planning Professionals



Planning a Community Estate Planning Day

• an organizational guide •

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HELPFUL HINT

This informational packet was developed for estate planning councils affiliated with NAEPC and provides basic information about National Estate Planning Awareness Week as well as suggestions to plan a community outreach program. The materials within can be used “as-is” or modified to meet the needs of your council.

Those councils that wish to start smaller are encouraged to reference the “Quick Start” guide for materials to assist. Please contact the national office or visit <http://www.naepc.org/affiliated-councils/awareness> for more information.

Introduction ·

NAEPC is pleased to offer its estate planning councils this “Estate Planning Day in a Box” kit to help councils get started planning a community outreach event. Within you will find materials to assist in organizing and forming the foundation for a successful Estate Planning Day. The startup process, or Phase I, is the most critical and important phase of the planning as it is the mainstay of developing a successful event.

Councils might consider planning a program in conjunction with a local sister organization, such as:

- Bar Association
- Society of Financial Service Professionals
- Financial Planning Association
- State Society of Certified Public Accountants
- Trust Officers of Local Banks
- NAIFA Chapter
- Planned Giving Council

It is important that the council understand the time and commitment involved in the organization of a successful community outreach program

In addition to the professional organizations noted above, you may also want to bring in your local community foundations, non-profit organizations, or universities and colleges to encourage participation, expand awareness of the program being created, and potentially increase the number of attendees.

National Estate Planning Awareness Week ·

Estate planning is an often overlooked element of financial wellness, it is estimated that over half of Americans – 56% – do not have an up-to-date estate plan!

National Estate Planning Awareness Week was adopted in 2008 to help the public understand what estate planning is and why it is such a vital component of financial wellness. Assisted by Rep. Mike Thompson (D-CA) and 49 additional members of the House of Representatives, H. Res. 1499 named National Estate Planning Awareness Week on September 27, 2008. A full copy of the resolution text can be found at <http://www.naepc.org/about/education-foundation/documents>.

The goal of The NAEPC Education Foundation is to work with the nearly 260 NAEPC-affiliated local councils to reach Americans on a regular basis with a reminder of the need for estate planning and how best to find a team of professionals to assist.

As an estate planning council, you have the ability to make a significant impact on the financial wellness of your home community.

Memo To Seek Approval From EPC Board ·

TO: [enter EPC name] Board of Directors

FROM: [Name and Office of EPC Board Member Submitting Proposal]

DATE: [enter]

RE: Proposal to Host Estate Planning Day During National Estate Planning Awareness Week

This memo serves as a formal request to add the planning and hosting of a community Estate Planning Day program to the agenda of our [enter date] board of directors meeting. I further recommend that we host this program during National Estate Planning Awareness Week, scheduled from [enter dates].

I believe that it is important that we participate in National Estate Planning Awareness Week and suggest we do so by having a community-based outreach program. To be successful we will need the support of the entire board of directors. It is also wise to consider the appointment of a chair of a steering committee at this meeting who will be responsible for the organization and oversight of this program, should the board choose to move forward.

Regards,

[Submitting Board Member Name]

Attachments:

- National Estate Planning Awareness Week Information
- HR 1499 Text
- Committee Responsibilities List
- Timetable

HELPFUL HINT

Use the documents or web links included within this packet for attachments.

Committee Structure ·

Steering & Oversight Committee

- Monitor progress of all committees through regular meetings
- Determine date of program
- Decide who will handle secretarial / staff duties
- Create and monitor budget ✓
- Form subcommittees
- Create a timetable for subcommittees (see template) ✓
- Develop format of program with programming committee
- Create Evaluation forms (see template) ✓

Facilities / Logistics Committee

- Investigate possible host locations ✓
- Check on availability ✓
- Conduct site visits to determine which option fits best ✓
- Determine all costs associated with the site ✓
- Reserve the location ✓
- Procure insurance and comply with hosting site requirements ✓
- Create map and directions for attendees ✓
- Guarantee numbers with site on or before date required ✓
- Print signs, including those that offer directions within facility ✓
- Arrange exhibitor tables ✓
- Handle food & beverage arrangements ✓
- Arrange at door logistics & greeters

Programming Committee

- Identify topics and presenters for program
- Approach and secure speakers
- Receive and process all registrations ✓
- Gather speaker presentations and create handout materials ✓
- Create name tags ✓

Sponsorship Committee

- Create sponsor package ✓
- Identify possible sponsors and distribute kit
- Conduct follow up to explain cost and benefits
- Secure commitments
- Send confirmation to committed sponsors and bill those who have not paid ✓
- Communicate with sponsors to collect the items promised with their benefit package / level of support ✓
- Send thank you notes

Advertising & Publicity Committee

- Create and distribute registration materials ✓
- Determine cost of various advertising options ✓
- Determine best choice of advertising to share message
- Write & distribute press releases
- Webpage creation and maintenance ✓

HELPFUL HINT

Many of the duties within this committee responsibility list may be handled by council staff. Those duties are noted by the ✓ symbol.

Financial Basics ·

Hosting a community outreach event may create a revenue opportunity and will also bring with it expense. Below lists possible sources of each. Your actual income and expense will depend on the type and scope of your chosen event.

Income

- Sponsorship registration
- Exhibitor fees
- Advertising in program
- Registration fees collected from attendees

Expense

- Administrative
- Advertising
- Audio-visual
- Attendee materials
- Committee meetings
- Food & beverage (include complimentary attendees when creating the f&b estimates)
- Insurance
- Photographer
- Postage, miscellaneous
- Printing, miscellaneous
- Recording of program, audio and/or visual
- Registration material preparation & printing
- Registration material postage
- Shipping materials to and from site
- Signage
- Speaker gifts
- Speaker travel and/or lodging
- Supplies

Timetable ·

Below is a list of major tasks and their suggested time of completion. It is not a full list, rather a starting point to base your official timeline on.

NAEPC suggests that the steering committee, sponsorship committee, and publicity committee meet monthly. Others should meet as needed, based on the tasks at hand.

Task	Responsibility of	Target Date
Appoint chair and steering committee	EPC Board	14 months prior
Appoint chair for each committee	Steering committee	12 months prior
Populate committees	Sub-committee chair	12 months prior
Create sponsor kit	Sponsor committee	10 months prior
Site selection process	Logistics committee	10 months prior
Approach sponsors	Sponsor committee	10 months prior, ongoing
Develop program & format	Steering / Program	10 months prior
Speakers / topics determined	Steering committee	8 months prior
Press releases and advertising finalized, determine schedule	Publicity committee	3 months prior
Registration materials finalized	Publicity committee	3 months prior
Volunteers secured for day-of	Program committee	2 months prior
Food & beverage decisions	Logistics committee	6 weeks prior
Speaker handouts received and prepared, attendee materials prepared	Program committee	1 month prior
Signage printed	Logistics committee	Final month
Print nametags	Program committee	Week of program
Thank you letters mailed to speakers and sponsors	Chair	2 weeks after program

Committee Service Interest Letter / Email

[enter date]

[Recipient Information]

HELPFUL HINT

Place this text on council letterhead.

Dear [enter recipient name]:

The [enter council name] is in the midst of planning a consumer estate planning day program, scheduled on [enter date], during National Estate Planning Awareness Week. The council board feels this is an exciting and important showcase for the members of the council, and also a fantastic way to serve our local community. Not only will this event educate the public about the need for estate planning by a qualified team, it will highlight the existence of the council.

The purpose of this letter is two-fold. First, as Chair of the Estate Planning Day Steering Committee, I invite you to contact me if you have any questions regarding the upcoming event. Second, I am seeking volunteers for various committees and to serve day-of. The committees are:

- List subcommittees here and who they are chaired by
- List other areas where volunteers are needed

Thank you for your consideration in joining us. Our goal is to have at least one person from each discipline represented on each committee. If you have any questions or would like more information on this exciting event, please contact me at [enter].

Sincerely,

[Sender name
Position within council]

Sample Sponsor Benefit Package ·

Presenting Sponsor, \$2,000

- Only one sponsor accepted
- 4 event registrations for company staff
- 10 event registrations to pass out to consumers
- Prominent logo appearing in all pre-event publications and promotions
- Full page ad in attendee materials
- Microphone time to welcome attendees
- Complimentary exhibit table

HELPFUL HINT

BE CREATIVE! Sponsor opportunities are nearly endless!

Major Sponsor, \$1,000

- No more than 2 sponsors selected at this level of support from different disciplines
- Logo appearing in all pre-event publications and promotions
- 3 event registrations for company staff
- 5 event registrations to hand out to consumers
- Half page ad in attendee materials
- Complimentary exhibit table

Sponsor, \$500

- Printed name in all pre-event publications and promotions
- 2 event registrations for company staff
- 2 event registrations to hand out to consumers
- Quarter page ad in attendee materials
- Complimentary exhibit table

Exhibitor, \$250

- Complimentary Exhibit table
- 1 event registration for company staff

Program Advertising, \$100

- Purchase a half-page ad in the attendee materials

**Special Note*

Should you choose to also do an insert in your local newspaper, these opportunities can be combined or amended with the in-person event levels of support.

Sample Registration Form ·

•— ESTATE PLANNING DAY REGISTRATION FORM

HOSTING COUNCIL NAME
DATE
TIME
LOCATION

Last Name: _____

First Name: _____

Name on Badge: _____

Company: _____

Address: _____

City: _____ State: _____ Zip Code _____

Phone: _____

Email: _____

[enter fee structure here]

•— PAYMENT DETAILS

Make check payable to and mail to:

[enter EPC address details]

or

Credit Card: AMEX MasterCard VISA

Card Number: _____

Exp. Date: _____

Name On Card: _____

Signature: _____

or

Register online at [enter]

•— REFUND POLICY

[enter, required when accepting credit cards]

HELPFUL HINT

Make sure you are collecting every detail you need from an attendee at the time of registration. Meal choice, session choices, etc. should all be considered when crafting your RSVP Form. Also, consider the “W’s” – who, what, why, where, when.

Sample Evaluation Form

1. Please rate the Estate Planning Day in the following areas:

Informative? ___ Very Good ___ Good ___ Fair ___ Poor
Well organized? ___ Very Good ___ Good ___ Fair ___ Poor
Answered your questions? ___ Very Good ___ Good ___ Fair ___ Poor

2. Location of the Estate Planning Day:

Directions to the location? ___ Very Good ___ Good ___ Fair ___ Poor
Ease of parking? ___ Very Good ___ Good ___ Fair ___ Poor

3. Was it easy to get information regarding the program and to register?

Obtaining information about the program was:

___ Easy ___ Somewhat Difficult ___ Very Difficult

Registering for the program was:

___ Easy ___ Somewhat Difficult ___ Very Difficult

4. As a result of the program will you be more likely to:

Update or complete your estate plan? ___ Yes ___ No

Get a team of professionals to assist you? ___ Yes ___ No

Learn the qualifications of your advisers? ___ Yes ___ No

Consider charitable giving techniques? ___ Yes ___ No

Consider insurance in your planning? ___ Yes ___ No

5. How did you hear about Estate Planning Day?

6. Additional Comments:

HELPFUL HINT

Use an evaluation to retrieve meaningful feedback from attendees. Make sure the questions are easy to understand, quick to complete, and crafted in a way that will help you plan future events. You may even wish to email the survey at the conclusion of the program.

Name and Contact Details (optional):

Sample Sponsor Thank You Letter ·

[date]

«First_Name» «Last_Name»«Designations»
«Name_of_Firm»
«Address_1»
«Address_2»
«City», «State» «Zip»

Dear «Salutation»:

Thank you for your support of the [enter council name] Estate Planning Day! I hope that you enjoyed your time with the program attendees. It is only with your support that this event is and will continue to be a success!

We welcome comments about your experience during the event. Please share them with [enter person name and details] at your earliest convenience.

Again, thank you for your support of this incredibly important community outreach program.

Yours truly,

[enter]
President
[enter council name]

[enter]
Chair
Estate Planning Day Steering Committee

Sample Speaker Thank You Letter ·

[date]

«First_Name» «Last_Name»«Designations»
«Name_of_Firm»
«Address_1»
«Address_2»
«City», «State» «Zip»

Dear «Salutation»:

On behalf of the [council name] Board of Directors, the Estate Planning Day Committee, and our staff, thank you for speaking at our recent consumer Estate Planning Day! We are grateful for your time, not only while at the event, but in preparing for it as well.

While we are still collecting the survey results, the attendee comments indicate an overwhelming success! We have heard many remarks from registrants about the high quality of the program and spirited presentations. For this, we say “thank you!” We hope you enjoyed your time with our attendees as well.

Yours truly,

[enter]
President
[enter council name]

[enter]
Chair
Estate Planning Day Steering Committee