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/affiliated-councils/awareness.

The goal of NAEPC is to work with its 275 affliated 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.

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

**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]
[enter]
President
Chair
[enter council name]
Estate Planning Day Steering Committee