

National Association of Estate Planners & Councils

Member Council Resource

Planning for a “First Class” Council Year... the Easy Way!

Most councils begin the year with the progression of leadership along with a new president charged with providing programs/events that will engage member’s intellect with interesting estate planning events. Having the best year possible with the resources that are available keeps members content and provides stability along with council growth. Committed **leadership**, meaningful **events**, great **communications** and using tools and resources from **NAEPC** will turn a good year into a very memorable experience for all. Here is how your council can achieve that worthy goal...

First, a few facts.....Disciplines vary within councils and generally are; law, accounting, financial services, bank trust and planned giving. All are intertwined in creating the estate planning process. While the EPC may not always be their primary professional organization, it is a professional home where members can explore their interests while sharing a common bond.

Given the diversity within a council, it is important to consider programs/events with broad appeal across the entire membership spectrum rather than favor those with the highest representation. Ideally, providing relevant, interesting and timely topics with compelling value consistently throughout the year does much to enhance audience satisfaction.

When crafting the year ahead, the board/ program chair have a choice of two paths: plan the entire year at the onset or plan it as the year progresses.

Planning the year in **advance**:

- Provides comfort by locking in topics and speakers well in advance
- Less flexible should something better comes up
- Hot topics can become “stale” if scheduled too far out

Planning as the year **progresses**:

- Provides the opportunity to have trending topics that pique interest
- Allows greatest diversity/flexibility in selecting topics/speakers.
- Planning 60-90 days out is not for everyone

Either way, those involved with the program planning process should set their sights on providing real value and strive to exceed member expectations while enhancing their awareness of estate planning. Simply repeating what has historically worked well can be comforting to the planning committee; however it may fall short in exploring the evolving nature of estate planning.

Communications plays a major role in a council’s success. The ability to reach out to members in multiple ways and capture their attention individually or on the council website is very important. Subpar communications is a leading cause of poor meeting attendance and member dissatisfaction.

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Utilizing NAEPC: To complete their quest for success, a council should always look towards the many resources, tools and expertise of National. **NAEPC** is a “gold mine” of ideas and services that is only a phone call or a few clicks away on the internet. Take a moment to visit www.NAEPC.org and see the array of services and ideas that you may wish to use in building your year.

In closing, having a **pro-active council** with solid **member** and **national communications** and a great **agenda** will provide a rewarding experience for the membership as well as those who have volunteered to lead it. **Providing value that exceeds member expectations** is the best way to create a robust council that will be around to serve future generations of Estate Planning professionals.

The decision to “**Fly First Class or Coach**” in the year ahead is rooted in the leadership’s level of **commitment to excellence** in their actions as well as their **dedication to the members**. “**Soaring with the Eagles**” is a lofty goal; working with National can help you achieve it. **Good Luck!!**

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