



National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

January 6, 2016

Esteemed Council Leader:

The National Association of Estate Planners & Councils is continuing the Every Council campaign this year – **an initiative to effectively communicate the many programs, services, and benefits of council affiliation directly with the NAEPC local council members.** This campaign seeks to distribute information by emailing your membership six times per year and mailing them the Annual NAEPC Advanced Estate Planning Strategies Conference brochure once a year. We give you our absolute assurance that the NAEPC will never make your personal information available to anyone outside of the NAEPC, nor will we ever sell it.

In the past, your council has not participated in the Every Council campaign. We write today to ask that you reconsider joining in this important outreach effort. We are asking for permission to reach your membership via email six times per year with our e-publication, NAEPC News, and make contact once per year via US mail with the brochure for the Annual NAEPC Advanced Estate Planning Strategies Conference. We sincerely hope that after reading this letter you will be encouraged to provide the NAEPC with a roster of your membership so that we may reach them in the manner described above.

Please discuss the Every Council campaign with your board and have them authorize your council's participation so the NAEPC can communicate in a meaningful way with your members. Please contact Sarah Butterfield at (866) 226-2224 for answers to any questions you may have. On behalf of the entire NAEPC board of directors, I thank you for your consideration.

With best regards,

Lawrence M. Lehmann, JD, AEP®
2016 President

Enclosures

The Association of Choice for Estate Planning Professionals



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EVERY COUNCIL CAMPAIGN

Program Outline & NAEPC Commitment

Program Outline

- Only an Annual NAEPC Advanced Estate Planning Strategies Conference registration brochure (hard copy) will be sent via US mail
- An email containing *NAEPC News* six times per year (past issues of this newsletter can be found at www.naepc.org/events/news)
- *NAEPC News* will only encompass the following items of interest:
 - Information about existing and new member benefit discount programs (a current list can be found on the “Member Services” page of www.naepc.org)
 - Information about the Annual NAEPC Advanced Estate Planning Strategies Conference, both the two-day educational program and Council Leadership Day activities
 - Information about the two NAEPC-Administered professional designations (Accredited Estate Planner® & Estate Planning Law Specialist)
 - Councils and/or members in the news
 - Items of interest to council leadership and members

NAEPC Commitment

- To strictly adhere to our privacy policy (a copy of the privacy policy can be found at www.naepc.org/privacy.web)
- To respond to all notices of suspected misuse immediately with a full investigation
- To offer **every member** of **every participating council** an opportunity to “opt out” in a manner that will not impact the communication from the leadership of the affiliated local council
- To offer each participating council an opportunity to “opt out” each calendar year with a statement in the annual dues notice
- To offer each new council an opportunity to choose whether they will take part in the program
- To offer each non-participating council an opportunity to “opt-in” each calendar year with a statement in the annual dues notice

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EVERY COUNCIL CAMPAIGN

Acknowledgment / Authorization

(Please complete and return via US mail, fax or scan and email.)

Council Name: _____

Please select one of the following options:

_____ Our Board of Directors **HAS** authorized the NAEPC to reach our members via email six times per year with *NAEPC News*, the official newsletter of the NAEPC, and once per year via US mail with the registration brochure for the Annual NAEPC Advanced Estate Planning Strategies Conference. We understand we will be given an opportunity each year with the annual council dues notice to review this decision and withdraw our permission if desired. Please choose one of the options below to transfer your data.

_____ Our Council has a Level II, III or IV NAEPC-hosted website and we authorize the NAEPC to obtain the first name, last name, mailing and email addresses for each of our members from that site.

_____ Our Council has a Level I Splash Page and I am emailing the first name, last name, mailing and email addresses in an **EXCEL** file (a template is available) to councilservices@naepc.org. Please include council name and your contact information in your submission.

_____ Our Board of Directors **HAS NOT** authorized the NAEPC to reach our members via email six times per year with *NAEPC News*, the official newsletter of the NAEPC, and once per year via US mail with the registration brochure for the Annual NAEPC Advanced Estate Planning Strategies Conference. We understand that we will be given an opportunity each year with the annual council dues notice to review this decision and offer our permission if desired.

Signature of Council Officer

Date

Printed Name of Council Officer

Position of Council Officer

The Association of Choice for Estate Planning Professionals