Welcome to the 49th Annual Conference

National Association of Estate Planners & Councils

& The NAEPC Education Foundation

NAEPC

The Association of Choice for Estate Planning Professionals

COUNCIL LEADERSHIP DAY

National Association of Estate Planners & Councils

Welcome & Opening Remarks

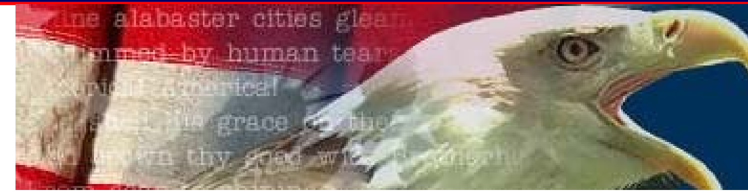
2012 President
Clark B. McCleary
CLU®, ChFC®, AEP® (Distinguished)

National Association of Estate Planners & Councils

NAEPC

Thank you for joining us to celebrate our 50th Anniversary

The Star Spangled Banner Lyrics
By Francis Scott Key 1814



Oh, say can you see by the dawn's early light
What so proudly we hailed at the twilight's last gleaming?
Whose broad stripes and bright stars thru the perilous fight,
O'er the ramparts we watched were so gallantly streaming?
And the rocket's red glare, the bombs bursting in air,
Gave proof through the night that our flag was still there.
Oh, say does that star-spangled banner yet wave
O'er the land of the free and the home of the brave?

Oh! thus be it ever, when freemen shall stand
Between their loved home and the war's desolation!
Blest with victory and peace, may the heav'n rescued land
Praise the Power that hath made and preserved us a nation.
Then conquer we must, when our cause it is just,
And this be our motto: "In God is our trust."
And the star-spangled banner in triumph shall wave
O'er the land of the free and the home of the brave!

National Association of Estate Planners & Councils

115 Affiliated Local Estate Planning Councils with a Representative in Attendance

Atlanta Estate Planning Council
Baltimore Estate Planning Council
Bluegrass Estate Planning Council
Boise Estate Planning Council
Boston Estate Planning Council
Boulder County Estate Planning Council
Bristol County Estate Planning Council
Estate Planning Council of Broward County
Bucks County Estate Planning Council
Estate Planning Council of Cape Cod
Centennial Estate Planning Council
Central Arizona Estate Planning Council
Central Florida Estate Planning Council
Central Texas Estate Planning Council
Chester County Estate Planning Council
Chicago Estate Planning Council
Cincinnati Estate Planning Council
Colorado West Estate Planning Council
Columbia Estate Planning Council (SC)
Dallas Estate Planning Council
Delaware Estate Planning Council
Denver Estate Planning Council
Denver Estate Planning Council
Estate Planning Council of Diablo Valley
East Alabama Estate Planning Council
East Coast Estate Planning Council (FL)
Eastern Illinois Estate Planning Council
Estate Planning Council of Eastern New York
Estate Planning Council of the Emerald Coast
Estate Planning Council of Central New York
Estate Planning Council of Indianapolis
Estate Planning Council of North Texas
Estate Planning Council of Northern Nevada
Essex County Estate Planning Council
Estate Planning Council of Cleveland
Fresno Estate Planning Council
Estate Planning Council of the Fun Coast
Greater Boca Raton Estate Planning Council
Estate Planning Council of Greater Miami
Greenville EPC
Estate Planning Council of Hampden County
Hampton Roads Estate Planning Council
Hawaii Estate Planning Council
Houston Business & Estate Planning Council
Houston Estate & Financial Forum
Hudson Valley Estate Planning Council
Land of the Sky Estate Planning Council
Lower Fairfield County Estate Planning Council
Macon Estate Planning Council
Estate Planning Council of Marion County
Martin County Estate Planning Council
Estate Planning Council of Memphis
Mercer County Estate Planning Council
Merrimack Valley Estate Planning Council
Financial & Estate Planning Council of Metropolitan Detroit, Inc.

National Association of Estate Planners & Councils

115 Affiliated Local Estate Planning Councils with a Representative in Attendance

Mid Florida Estate Planning Council
Estate Planning Council of Middle Tennessee
Milwaukee Estate Planning Forum, Inc.
Montgomery County Estate Planning Council
Montgomery Estate Planning Council
Estate Planning Council of Naples
Nassau County Estate Planning Council
New Hampshire Estate Planning Council
New Orleans Estate Planning Council
Estate Planning Council of New York City
Norfolk & Plymouth Estate & Business Planning Council
North Central Florida Estate Planning Council
North Central West Virginia Estate Planning Council
North Coast Estate Planning Council
North Dade/South Broward Estate Planning Council
North Georgia Estate Planning Council
North Suncoast Estate Planning Council
Estate Planning Council of Northeast Florida
Northeast Pennsylvania Estate Planning Council
Estate Planning Council of Northeast Wisconsin, Inc.
Northeastern Michigan Estate Planning Council
Northern Virginia Estate Planning Council
Estate Planning Council of Northwest Florida
Northwest Washington Estate Planning Council
Orange County Estate Planning Council
Palm Beach County Estate Planning Council
Philadelphia Estate Planning Council
Pinellas County Estate Planning Council
Pittsburgh Estate Planning Council
Estate Planning Council of Polk County
Pomona Valley Estate Planning Council
Quad City Estate Planning Council
Red River Valley Estate Planning Council
Redwood Empire Estate Planning Council
Riverside E Estate Planning Council
Estate Planning Council of Rockland County
San Antonio Estate Planning Council
Estate Planning Council of San Bernardino
San Francisco Estate Planning Council
Estate Planning Council of Seattle
Sioux Falls Estate Planning Council
Siouxland Estate Planning Council, Inc.
Estate Planning Council of Southeast Denver
Southern Arizona Estate Planning Council
Southern Delaware Estate Planning Council
Spokane Estate Planning Council

National Association of Estate Planners & Councils

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Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP®
Lakewood, CO

National Association of Estate Planners & Councils

NAEPC

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Registered to attend as of October 26, 2012

Hartman Axley, CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP®
Year of Presidency: 1974-1975
Lakewood, CO

Kathleen J. Belmonte, CTFA, AEP®
Year of Presidency: 2009
Tampa, FL

Herbert Chasman, CLU®, ChFC®, JD
Year of Presidency: 1978-1979
Irvine, CA

Edward Cutler, AEP®
Year of Presidency: 1994-1995
Tampa, FL

Walter Lee Davis, Jr., Atty, CPA, AEP®, EPLS
Year of Presidency: 2008
Johnson City, TN

Dan H. Florence, JD, AEP®, CTFA
Year of Presidency: 2005
Nacogdoches, TX

Gary L. Flotron, MBA, CLU, ChFC, AEP®
Year of Presidency: 2007
St. Louis, MO

Thomas M. Forrest, TO, CPA, AEP® (Distinguished)
Year of Presidency: 1997-1998
Wilmington, DE

Michael W. Halloran, CLU®, ChFC®, AEP®, CFP®, REBC, RHU, LUTCF, MSFS, MSM
Year of Presidency: 2010
Jacksonville, FL

A. Stephen McDaniel, JD, AEP®, EPLS
Year of Presidency: 2004
Memphis, TN

Gerald A. Youngs, AEP®, CTFA
Year of Presidency: 2002
Clearwater, FL

National Association of Estate Planners & Councils

National Association of Estate Planners & Councils
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Mobile, AL

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Colleen D. O'Connell, JD, AEP®
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Orlando, FL

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West Palm Beach FL

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Marina Nice, Esq.
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Hudson, OH

National Association of Estate Planners & Councils Board Members with Term Expiring December 2014

One Appointment to a Term Ending December 2013

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Wilmington Family Office ·Wilmington, DE
Category: CPA

Term Ending December 2014

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Morgan Stanley Smith Barney, LLC · Syracuse, NY
Category: CFP® /ChFC®, AEP®

Thomas M. Borchert, CLU®, ChFC®, LUTCF, AEP®, CLTC
Professional Insurance & Financial Alternatives · Sioux City, IA
Category: CLU®

Term Ending December 2014 *continued*

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Bessemer Trust Company, N.A. · Dallas, TX
Category: Trust Officer

Charles V. Douglas, JD, CFP®, AEP®
Wells Fargo Private Bank · Atlanta, GA
Category: Attorney

Robert P. Goodman, CPA, AEP®, CFP®
U.S. Trust, Bank of America Private Wealth Management · Phoenix, AZ
Category: CPA

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Warren Averett, LLC
Montgomery, AL

Secretary
Jordon N. Rosen, CPA, MS (taxation), AEP®
Belfint, Lyons & Shuman, PA · Wilmington, DE

Immediate Past President
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McCleary & Associates
Houston, TX

National Association of Estate Planners & Councils

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2013 President

Joanna Averett, MBA, CFP®, AIF®, AEP®

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Retiring Board Member & Conference Chairman

John K. O'Meara
JD, CLU®, ChFC®, CFP®, AEP®
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National Association of Estate Planners & Councils

Retiring Board Member & Past President

Joseph V. Falanga
CPA, AEP®, TEP
U H Y Advisors NY, Inc.

Introducing The NAEPC Education Foundation
Your 501(c)(3) at Work!!!

The NAEPC Education Foundation

Dedicated to Improving estate and financial planning & financial literacy™

Background & Mission

The NAEPC Education Foundation, Inc. was formed in 2005 as a 501(c)(3) nonprofit organization with a mission to

- Provide the public with financial awareness programs and improve financial literacy
- Educate the public regarding the benefits of the multi-disciplinary team concept of estate and financial planning as espoused by the National Association of Estate Planners & Councils
- Develop educational programs for estate and financial planning professionals
- Develop and promote a community outreach program for the general public
- Hold educational conferences, seminars, forums, and meetings regarding estate and financial planning

Vision

Significantly improve both the public's financial awareness and their financial literacy, while developing educational content to assist professionals in providing high-quality, cost-effective services to the public.

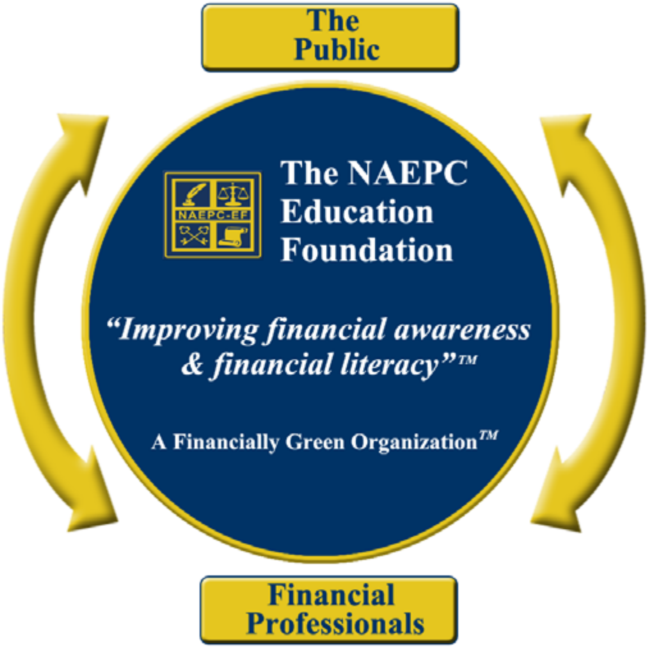
The Big Challenge

- 120 million Americans don't have a current estate plan
- Half of Americans are unfamiliar with retirement planning tools
- Without a proper & well thought out estate & financial plans people waste big money and often ruin their financial futures
- 85% of Americans over 65 are totally dependent on Social Security (EBRI-June 2010)

Uniquely Positioned

We are uniquely positioned to understand & serve the public & financial service professionals

As leaders in the estate and financial planning community, we have first-hand experience with the challenges Americans face with regards their estate and financial planning.



Helping to make this a better world…

Help Us by Being Part of the Solution

Goals

- Alert, educate, motivate & assist the 120 million American's that do not have a current estate plan to cost effectively get one, and to keep their estate & financial plans up-to-date going forward
- Touch every American at least twice a year through
  - **Strategic venues that share high quality educational content & tools**
  - **Our public web portal, seminars, programs, media, & relationships**
  - **Other to be developed activities**
- Generate business for NAEPC members, AEP®'s, & EPLS's and other qualified estate and financial planning professionals
  - **How much new business can your council members handle?**
- Generate donations, planned gifts, bequests, and alternate beneficiary designations for nonprofits

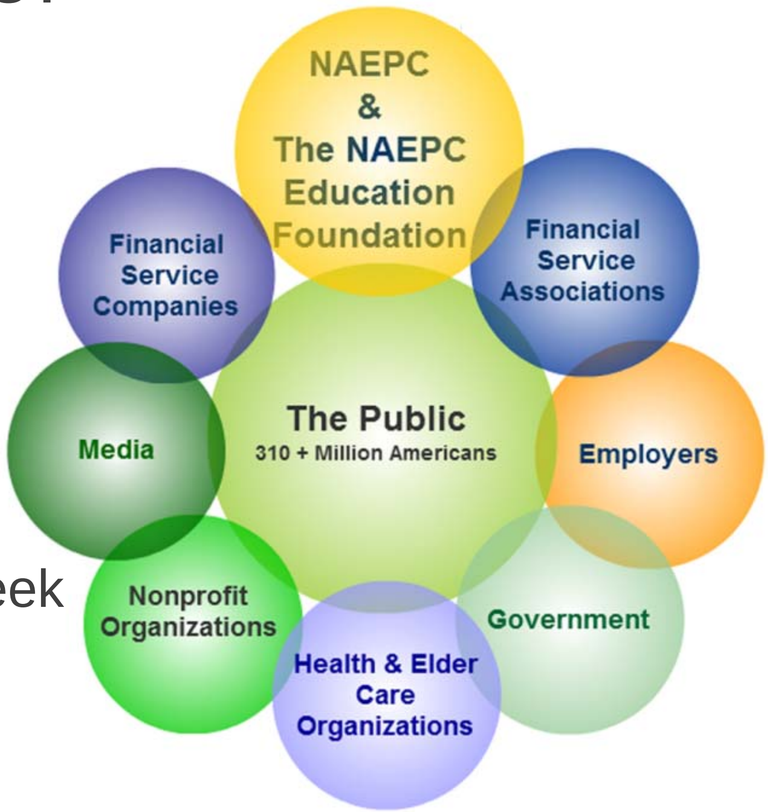
Community & Social Network Exposure Model

How are we accomplishing this?

Through supporting
- Financial services associations
- Professionals and companies
- Nonprofits
- Small and large employers
- Our government and the media

Using strategic venues build around
- National Estate Planning Awareness Week (October) and
- National Financial Literacy Month (April)

Sharing high quality estate and financial planning content with constituents.



Endorsements & Support

- ACTEC
- American Association of Attorney - CPAs
- American Bar Association - Real Property, Trust & Estate Law
- American Bar Association - Tax Section (Estate & Gift Tax Com)
- American Institute of Certified Public Accountants
- Association of Fundraising Professionals
- Financial Planning Association®
- National Academy of Elder Law Attorneys
- National Academy Foundation
- Partnership for Philanthropic Planning
- Society of Financial Service Professionals
- Stelter Company

The NAEPC Education Foundation

Sampling our Media Blitz

2011

2012

The NAEPC Education Foundation

Sampling from our Webinar Feedback

Event Summary

- Participants tuned in from 47 states (plus DC)
- Demographics: 49% male / 51% female
- Average duration: 48 minutes (out of 62 minutes)
- Viewers: 78% Live / 22% On-demand (as of 10/18 - only 24 hours after the live broadcast)

Actions to Be Taken: *(based on responses to the post-event survey – participants were able to choose more than one action)*

- **82% plan to visit the estate planning website (www.estateplanninganswers.org)**
- **65%% plan to discuss estate planning with their spouse**
- **58% plan to check/update beneficiaries**
- **40% plan to seek help from a financial planning professional**

Overall Feedback:

- 100% valued the Q&A
- 99% found the seminar informative
- 97% rated the online format good to excellent

The NAEPC Education Foundation

Key Benefits to the Public, Professional, Nonprofits, & Economy

Key Benefits using this winning approach

- American families benefit by learning how to better and cost effectively address their estate and financial planning challenges
- Financial professionals benefit by acquiring new business from more informed and motivated clients
- The media wins by delivering valuable content to its readers
- Nonprofits win with increased donations, planned gifts, alternate beneficiary selections, and bequests
- The overall community wins with a stronger and financially sound economy.

Quick Look at Our 2012 Key Accomplishments

- **March** - Advanced our navigation on www.EstatePlanningAnswers.org
  - We still have some exciting work to do and would welcome your suggestions
- **April** - Successfully garnered the support of
  - American Institute of Certified Public Accountants (AICPA)
  - American Association of Attorney - Certified Public Accountants
  - American Bar Association - Real Property, Trust & Estate Law
  - Financial Planning Society (FPA)
  - Society of Financial Service Professionals
  - National Academy of Elder Law Attorneys
  - Partnership for Philanthropic Planning
  - and the may other associations and nonprofits

  to and successfully participated in National Financial Literacy Month.
- **April** – Successfully produced our second Foundation Report
- Continue to advanced our infrastructure

The NAEPC
Education Foundation

Quick Look at Our 2012 Key Accomplishments

- **April** – Entered into a strategic relationship with the Stelter Company to promote and support estate and financial planning awareness to their 3,000 nonprofit clients during NFLM & NEPAW and throughout the year
- **May-June** –Jonathan Blattmachr, Esq., AEP® (Distinguished), recognized as one of the country's most creative trusts and estates lawyers, author and speaker; and Janet Novack, leading financial journalist, exceptional communicator, and the Washington D.C. Bureau Chief & Executive Editor for Forbes agreed to be our 2012 honorary co-chairpersons for NEPAW
- **August** - Launched our online publishing with two new eBooks

Quick Look at Our 2012 Key Accomplishments

- **August** - The National Academy Foundation and NAEPC-EF signed a MOU to begin working together to raise awareness, and college and career readiness among low income populations about estate and financial planning and careers in the financial services. This will be accomplished through
  - Curriculum collaboration to assure that students are obtaining essential financial literacy knowledge and skills, as well as understanding career opportunities and pathways into the financial services professions.
  - Implement professional development for teachers of finance to assure they have the knowledge and information necessary to deliver instruction in finance.
  - Recruitment of finance industry members to serve on NAF Advisory boards.
  - Increase internship opportunities
- **October** – Successfully completed 2012 National Estate Planning Awareness Week
- **October** – Completed our the NAEPC-EF Introduction Brochure
- **October** – Opened potential grants discussions with two large family offices
- **October** – Launched our 2012 Year End Capital Campaign

Council Challenge #1

We've gotten the big financial awareness ball rolling…

Now we would like to offer you a fun challenge!

During NEPAW & NFLM a contest with affiliated local estate planning councils for the "Best"

- Ads
  - **Newspaper**
  - **TV**
  - **Radio**
- Client checklist
- Local community outreach program
- National community outreach program

The NAEPC Education Foundation

Council Challenge #2

There are over 120 million Americans without an up-to-date estate plan. We are looking for some assistance in developing and implementing a statistical survey model to track our progress.

Would you help us with this exciting initiative? We need some

- Volunteers
- Grants
- Sponsorships
- Donations

The NAEPC Education Foundation

2012-2013 Campaigns & Programs

- Promoting estate and financial planning awareness & financial literacy
  - National Estate Planning Awareness Week (October)
  - National Financial Literacy Month (April)
  - The Foundation's public financial portal at www.EstatePlanningAnswers.org
- Advancing our publishing division
- Developing professional educational programs
- Funding scholarships for students leading to estate & financial professions
- Capital campaign

Thank You

The NAEPC Education Foundation wishes to thank

2012 Honorary Co-Chairs for National Financial Literacy Month

Sidney Kess, CPA, JD, LL.M., AEP® (Distinguished)
Andrea Millar, CPA/PFS

for helping to make the 2012 National Financial Literacy Month a tremendous success

2012 Honorary Co-Chairs for National Estate Planning Awareness Week

Jonathan Blattmachr, Esq., AEP® (Distinguished)
Janet Novack, Washington D.C. Bureau Chief & Exec. Editor for Forbes

for helping to make the 2012 National Estate Planning Awareness Week a tremendous success

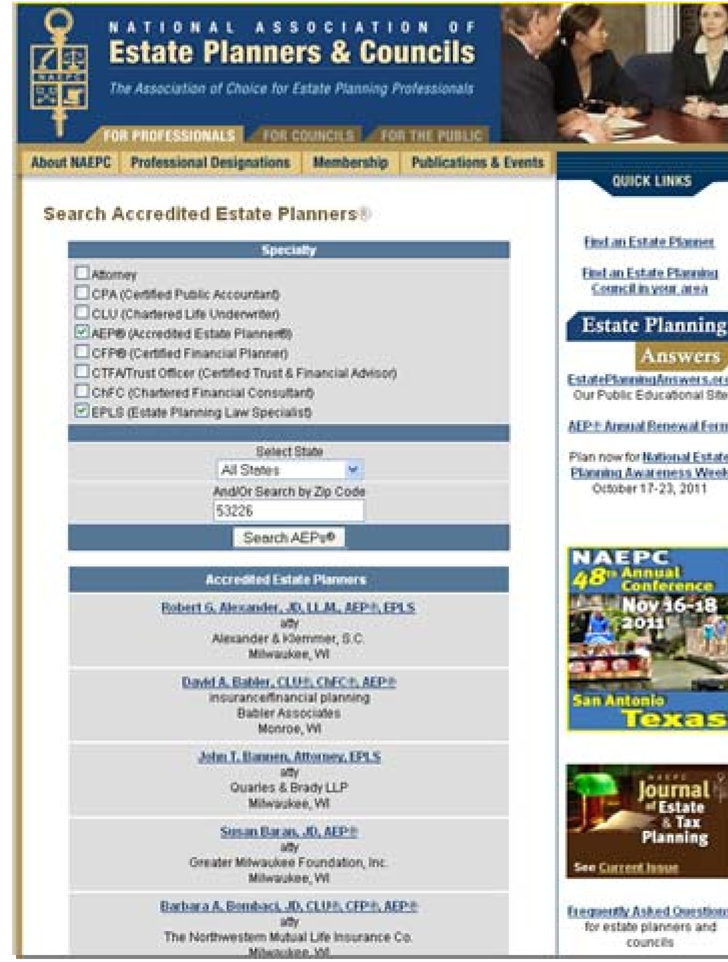
The NAEPC EDUCATION FOUNDATION

Public Financial Portal

Visit us at
www.EstatePlanningAnswers.org

Public Financial Portal – Continued

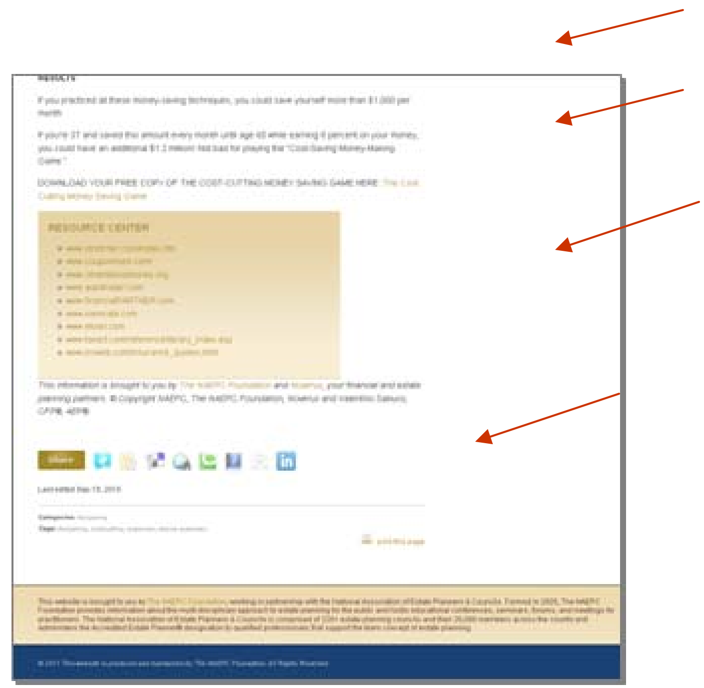
Find an AEP® or find councils easily



Public Financial Portal – Continued

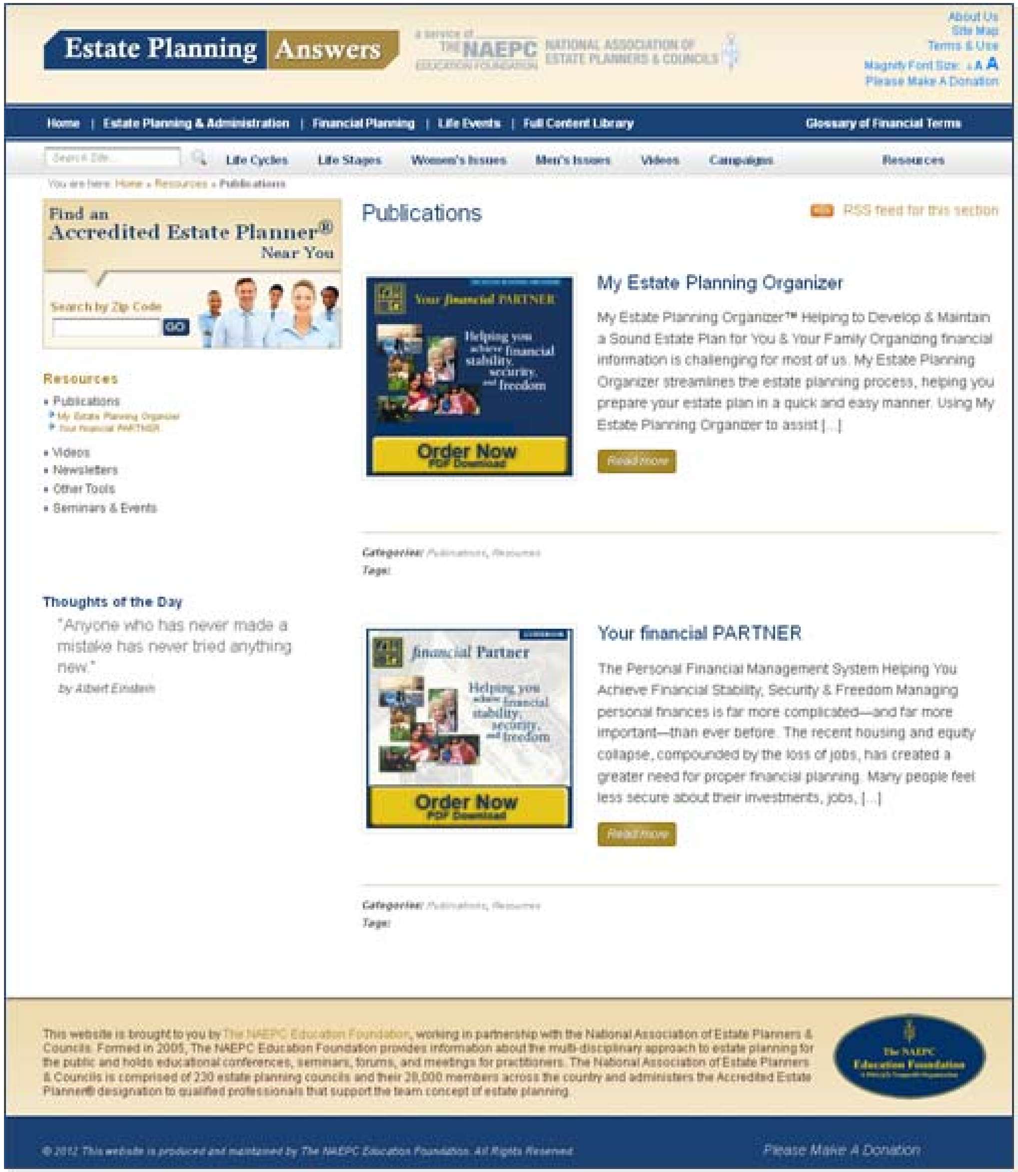
The NAEPC Education Foundation

Timely content, great resource links, downloadable worksheets, forward to your social networks, …



The NAEPC
Education Foundation

Our Publishing Division



"*My Estate Planning Organizer* is an outstanding guide for preparing and helping readers through the estate planning process.

... It also includes a useful form set and a simple to use 6 step process that can save you time and money working with their financial professionals.

Once you have created or updated your estate plan, this amazing tool can help you keep your estate plan organized and up to date over your lifetime.

I highly recommend *My Estate Planning Organizer* to estate planning professionals for use with their clients and to consumers for use with their estate planners."

Sid Kess

Sidney Kess, JD, LLM, CPA, AEP® (Distinguished)

"The **Your *financial* PARTNER** Guidebook is a must read publication that contains the core principles of personal financial management that are not taught at home or in school.

... I would recommend it as an excellent tool for estate planners and financial advisors to use with their clients as well as for consumer to use with their financial advisors. It can also serve as an excellent tool to improve financial literacy as an employee benefit, and as curriculum for high school and college level courses on personal financial management."

Sid Kess

Sidney Kess, JD, LLM, CPA, AEP® (Distinguished)

Visit us at

http://www.estateplanninganswers.org/category/resources/publications/

Be sure to mark you calendars

for the NAEPC 50th Annual Conference

November 20-22, 2013 in Las Vegas

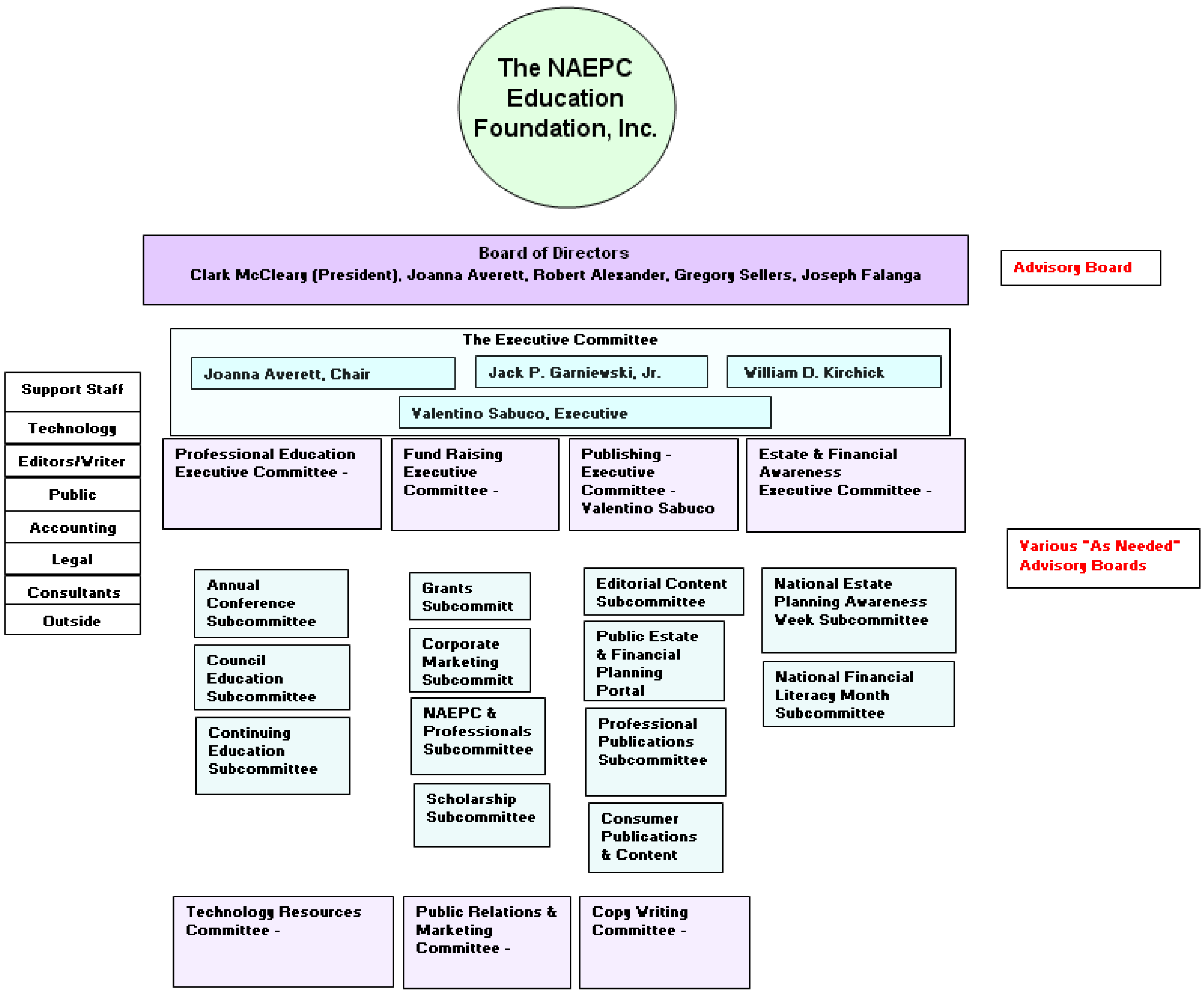
The NAEPC Education Foundation

2012-2013 Project Timetable

	Description	Target Completion Date
1.	1st NAEPC-EF App	December 1st
2.	Capital Campaign	ASAP
3.	National Academy Foundation	Ongoing
4.	The Stelter Company	Ongoing
5.	Produce and broadcast for TV, web, tablets, smart phones, and radio an estate and financial planning awareness program	April 1st
6.	National Financial Literacy Month	April 1st
7.	Professional Financial Portal	July 1st
8.	National Estate Planning Awareness Week	3rd Week in October
9.	www.EstatePlanningAnswers.org / Publishing	Ongoing
10.	Scholarships	Ongoing

The NAEPC Education Foundation

Our Organizational Structure

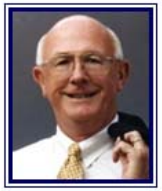


The NAEPC Education Foundation

Leadership & Key Personnel

Our 2012 Officers

The following highly distinguished nationally known professionals serve as the Board of Directors for The NAEPC Education Foundation and serve without compensation, donating their time, professional expertise, and resources to advance the mission of our organization.



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McCleary & Associates

Houston, Texas

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Alexander & Klemmer, S.C.

Milwaukee, Wisconsin

TREASURER

Joanna Averett, MBA, CFP®, AIF®, AEP®

First American Trust

San Bernardino, California

SECRETARY

Gregory E. Sellers, CPA, AEP®

Warren Averett, LLC

Montgomery, Alabama

IMMEDIATE PAST PRESIDENT

Joseph V. Falanga, CPA, AEP®

UHY Advisors

New York, New York

Our Foundation Executive Committee

Co-Executive Officer - Chair

Joanna Averett, MBA, CFP®, AIF®, AEP®

First American Trust

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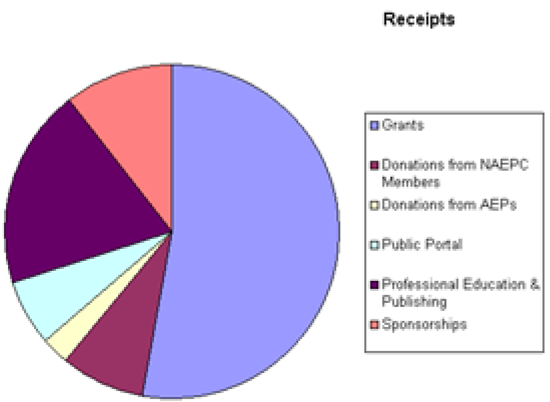
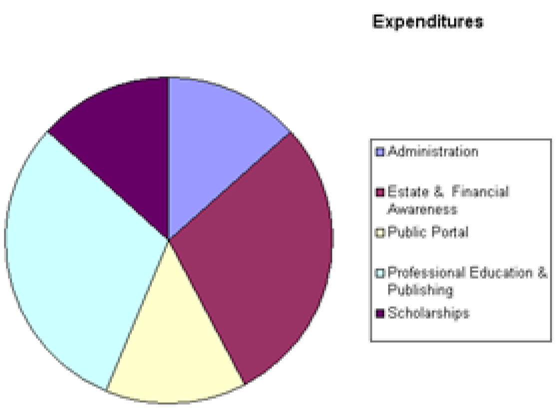
2012-13 Fund Raising & Operating Goals

Targeted Receipts			
Grants	$1,000,000		53%
Donations from NAEPC Members	150,000		8%
Donations from AEP®s Designees	50,000		3%
Public Portal	125,000		7%
Professional Education & Publishing	365,000		19%
Sponsorships	200,000		11%
Total Receipts		$1,890,000	100%
Targeted Expenditures			
Administration	$239,000		13%
Estate & Financial Awareness	505,000		27%
Public Portal	245,000		13%
Professional Education & Publishing	540,000		29%
Scholarships	236,000		12%
Total Expenditures		$1,765,000	93%
Targeted Cash Flow (Deficit) to Build Reserves		$125,000	7%





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The NAEPC Education Foundation

Council Challenge #3

2012 Year End Capital Campaign Challenge

- Our target is $1,000,000 by December 31, 2012
- Will you helps us by
  - Speaking with your council boards about a possible donation
  - Sharing our Foundation Report with your NAEPC members, sponsors, and associates and ask for assistance
  - Talking with your financial service companies about supporting us
  - Helping us with introductions to grant giving foundations and philanthropists who might support our mission for improving estate and financial planning awareness and financial literacy

The NAEPC Education Foundation

We Can't Do This Alone – We Need Your Help!!!

Please consider making a tax deductible contribution to

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Donor Contribution Form in your packet or online at

The NAEPC Education Foundation webpage at
www.naepc.org/foundation_contributors.web

Thank you for your consideration and support

Your 501(c)(3) at Work!

If you would like additional information on how you can make a difference

Please contact

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Thanks again for your consideration!

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NAEPC Webmaster

Robert P. Goodman
Chairman

Walt Tchirkine
Chris Jakyma
Vice-Chairmen

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New Features for 2012

- Social icons/links for council sites:
  - EPC of Greater Miami
- Streamlined RSVP function (Level 3+)
  - Options for "Unable to Attend" and "No Charge"
  - Less personal information needed if no credit card
- New feature:
  - Estate Planning Services Directory (Level 3+ only)
- New App for Android/iPhone/iPad
- Reprogramming and modernization of Council and National sites, admin area

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Program Levels

- Options for council administrators:
  - Link to external site
  - Level 1: Directory listing on NAEPC.org
  - Level 2: Standard Site ($800/year)
  - Level 3: Deluxe Site ($1,200/year)
  - Level 4: w/Pay. Processing ($1,600/yr)
- **2012 Promotion:** 50% off first-year fee for new site or upgrade costs.

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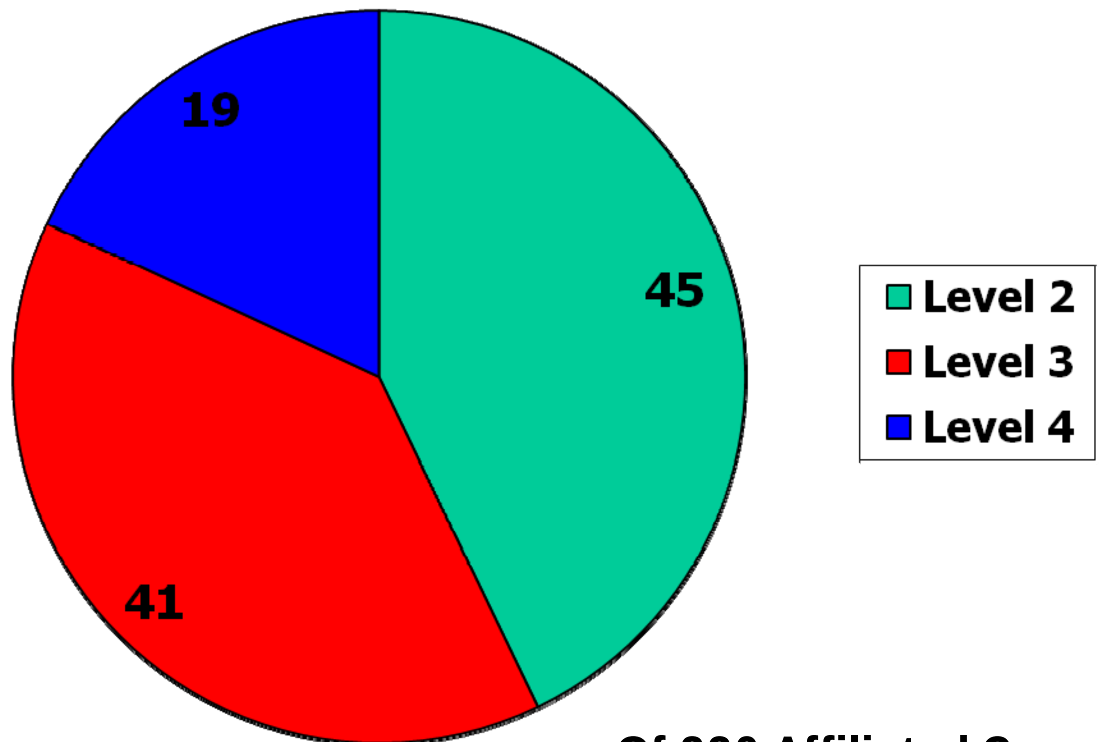

Of 220 Affiliated Councils

Estate Planning Services Directory

- Public directory of service providers allows full member list to be private
- Allows for service listings of non-members
- Revenue opportunities:
  - Main page banners
  - Enhanced listings
  - Logos and links
  - Non-member listings
  - Additional category listings

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New App for Android / iPhone / iPad

- Find AEP®
- Find EPCs
- Events
- Benefits
- 4 Clients
- Journal
- Contest!
- Contact

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Web Site Support Contacts

- First contact is NAEPC staff at: admin@naepc.org
- You may hear back from Bruce Newburger: webmaster@naepc.org
- Bruce available for appointments all day Wednesday and first half of Thursday

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Accredited Estate Planner® Designation Committee

Chair:

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CTFA, CFP®,

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National Association of Estate Planners & Councils

NAEPC

Highlights from 2012

- Increase in Designation Growth & Acceptance
- Ongoing Coursework Review
- Social Network Development –LinkedIn
- 2013 Estate Planning Hall of Fame® Entrants Selected
- Review of Nomination & Selection Procedure for the Estate Planning Hall of Fame®

Council Nominated AEP® Program Details

Councils with 100 members or less –

1 nomination from each discipline plus 1 additional in any discipline

Councils with 101 members or more –

2 nominations from each discipline plus 2 additional in any discipline

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Council Nomination Resolution Takes Place of

Professional References

19 Councils Using the Council Nominated AEP® Program in 2012

National Association of Estate Planners & Councils

The following council have thoughtfully nominated individuals to attain the Accredited Estate Planner® Designation during 2012:

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Central New York Estate Planning Council
Centre Region Estate Planning Council
Chester County Estate Planning Council
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Palm Beach County Estate Planning Council
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Estate Planning Council of San Diego
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Estate Planning Council of Southeast Denver
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Education

Networking

Practice Growth

Marketing

National Association of Estate Planners & Councils

Break

10:25 - 10:50am

Foyer

Don't miss your chance to speak with representatives from Be The Match, the national registry of bone marrow donors!

Welcome to the
49th Annual Conference

National Association of Estate Planners & Councils

& The NAEPC Education Foundation

NAEPC

The Association of Choice for Estate Planning Professionals

COUNCIL LEADERSHIP DAY

NAEPC

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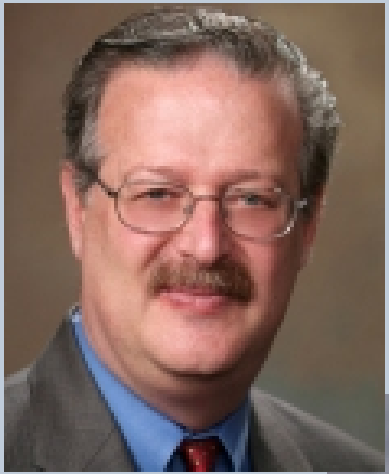

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Robert G. Alexander, JD, LL.M., AEP®, EPLS
Kathleen J. Belmonte, CTFA, AEP®
Timothy K. Bronza, CPA/ABV, ASA
Stacey Cole, JD
Joseph V. Falanga, CPA, AEP®, TEP
Gary L. Flotron, MBA, CLU®, ChFC®, AEP®
Pettus C. Gibbons, MEd, CLU®, ChFC®, LUTCF, AEP®
Michael W. Halloran, CLU®, ChFC®, AEP®, CFP®, REBC, RHU, LUTCF, MSFS, MSM
Lesley S. Hogan, JD, LL.M.
Lawrence M. Lehmann, JD, AEP®

National Conference Committee ***continued***

Lawrence J. Macklin, CPA, Esq., TO
Paul J. Pantano, CLU®, ChFC®, AEP®, CASL, MSFS
Jordon N. Rosen, CPA, MS (taxation), AEP®
Harold Schwartz, Jr., LL.B., LL.M., CLU®, ChFC®, RHU, REBC, FLMI, CEBS, AEP®
Robert C. Slane, CLU®, AEP®

Local Conference Committee

Timothy K. Bronza, CPA/ABV, ASA
Stacey Cole, JD
Karen L. Lee Fatt, CTFA, AEP®, CES®
Marina Nice, Esq.
Robert C. Slane, CLU®, AEP®

National Association of Estate Planners & Councils

49th Annual Conference Sponsor Bonus Sessions

Thursday, November 8, 2012 • 7:00 am

"Ten Minutes to Doomsday: Wealth Planning in an Uncertain World"

Offered by: Thomas J. Pauloski, JD of Bernstein Global Wealth Management

"Exit Options for Clients with CRTs"

Offered by: David Murray of Sterling Foundation Management, LLC

Friday, November 9, 2012 • 7:00 am

"The Secondary Market for Life Insurance – The Market Today"

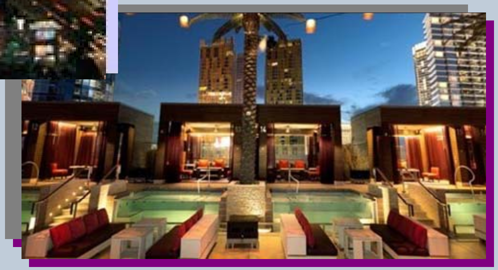
Offered by: Peter Hershon of Coventry

NAEPC

National Association of Estate Planners & Councils

National Association of Estate Planners & Councils
& The NAEPC Education Foundation

50th Annual Conference & Celebration



Las Vegas, Nevada
Cosmopolitan of Las Vegas

November 20 - 22, 2013

National Association of Estate Planners & Councils

National Association of Estate Planners & Councils & The NAEPC Education Foundation

51st Annual Conference

San Antonio, Texas
Marriott Rivercenter

November 5 - 7, 2014

NAEPC

National Association of Estate Planners & Councils

Council Relations Committee

Chair:

Joanna Averett, MBA, CFP®, AIF , AEP®

National Association of Estate Planners & Councils

Council Relations Committee

Council Relations Committee Purpose

- Assist affiliated local councils in understanding the benefits, programs, and services offered by the NAEPC
- Assist unaffiliated local councils in the affiliation process

National Association of Estate Planners & Councils

NAEPC

Council Relations Committee

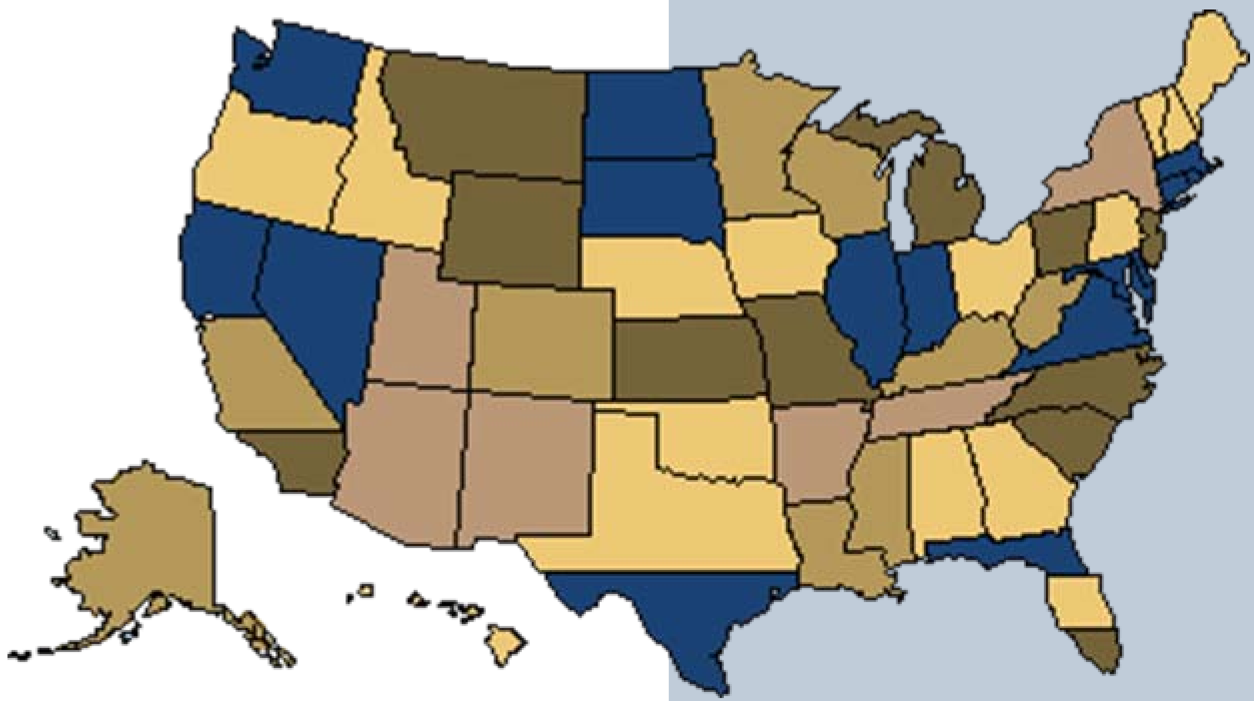
Facts and Figures

- 230+ affiliated local councils and their 27,000 members
- Approximately 80 prospect councils throughout the United States
- Active and engaged committee members

NAEPC

National Association of Estate Planners & Councils

Council Relations Committee Territories



National Association of Estate Planners & Councils

Council Relations Committee

Standard Benefits of Membership

Online listing as an affiliated council with contact information on www.naepc.org

Growing list of valuable benefits available to your membership with NO additional work by your board

Trusts & Estates ($129 subscription rate)

Ruby Receptionists

NAEPC Journal of Estate & Tax Planning

National Association of Estate Planners & Councils

Council Relations Committee

Standard Benefits of Membership

Regular communication from NAEPC just for your leadership

Member retention through use of the council nominated Accredited Estate Planner® designation program

Invitation to participate in “Council Leadership Day” at annual conference and access to materials post-conference

National Association of Estate Planners & Councils

Council Relations Committee

Standard Benefits of Membership

Links to referral lists and sample documents, "best practice" information, and other councils

Ability to engage one <u>FREE</u> yearly national speaker through No-charge Speaker Program (council must provide reimbursement for travel & lodging expenses)

Access to online Speaker's Bureau containing 40+ speakers with varying areas of expertise

National Association of Estate Planners & Councils

Council Relations Committee

Optional Benefits (Councils Must Opt-In)

Enroll membership in national newsletter, *NAEPC News*

Continuously enhanced website platforms

Leimberg (LISI) Service

Benefit Includes: Retirement and Roth IRA calculators; Ten-year archive of monthly FaxNet data service; Section 7520 and other important rate information

NAEPC

National Association of Estate Planners & Councils

Council Relations Committee

Optional Benefits (Councils Must Opt-In)

Leimberg (LISI) Service, continued

Cost to NAEPC affiliated councils:

To enroll in Jan., Feb., March, or April - $18/member

To enroll in May, June, July, or Aug., - $14/member

To enroll in Sept., Oct., Nov., or Dec., - $24/member

**covers the last 4 months of the year and all of the following year.*

<u>All</u> members of a council must enroll.

National Association of Estate Planners & Councils

Council Relations Committee

Special Benefit for Councils Using a Level 4 Website

Midwest Transaction Group Merchant Account Services

- Great Rates
  - qualified swiped transactions cost only 1.55% + 20¢.
  - qualified non-swiped transactions cost only 2.25% + 20¢.

- Incredible Customer Service
  - available 24 hours a day, 7 days a week from people you know and trust – you'll never get an impersonal call center.

- Unmatched Experience
  - legal and accounting communities have repeatedly made Midwest Transaction Group their number one processing choice

- Free PCI Compliance Support
  - specialists will help you comply with the new PCI security standards and meet the related filing requirements, at no cost

National Association of Estate Planners & Councils

Council Relations Committee

Council Benefit Programs

- Sterling Cut Glass
  - Discounted glass and crystal pieces
- PS Awards
  - Discounted plaques, award pieces, novelty items

National Association of Estate Planners & Councils

Council Relations Committee

Referral Lists & Documents

Creating a LinkedIn Group - Considerations & Decisions
Best Practices for Recognizing New & Existing AEP® Designees
Council Leadership Day – Why Should Our Council Send a Representative?
What Type of Insurance Does our Council Need?
Why Does Our Council Need an Administrator?
Sample pre-meeting Powerpoint presentation
Sample Sponsor Kit
Sample Speaker Confirmation Notice
Model Non-Profit Corporation Bylaws
Model Board Nomination Form
Sample Whistleblower Policy

National Association of Estate Planners & Councils

Every Council Campaign

Every Council Campaign

The NAEPC Initiative to Reach Every Member of Your Council

- ½ of affiliated local councils participating currently
- Over 17,000 enrolled members learning about benefits available because of your council's membership without additional effort on behalf of your board!

National Association of Estate Planners & Councils

Every Council Campaign

Our Commitment to You

- *NAEPC News* distributed via email six times per year with opt out opportunity
- Hard copy annual conference brochure once per year
- We will never sell contact information or provide it to outside vendors
- Authorization form required to enroll (found in back of your services packet here at the 49th Annual Conference)
- Yearly opt-out provided within annual dues notice

National Association of Estate Planners & Councils

Member Benefit Programs

Chair:
Cindy D. Causby, CTFA, AEP®

National Association of Estate Planners & Councils

Value Partners Added in 2012

American Dream Planner LLC
BizActions LLC
Cards for a Cure
CBData™
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy
CrummeyService
International Genealogical Search Inc.
Lawgic, LLC
My Perfect Will
Oswald Companies Personal Excess Liability
The Ultimate Estate Planner
WealthManagement.com

National Association of Estate Planners & Councils

Value Partners

ABA Book Publishing / The ABA Checklist for Family Heirs…
Acquire Direct Marketing
Advisys
AfterSteps
American Dream Planner LLC
Amicus Creative Media & Legal Vault
BizActions LLC
Business Valuation Resources, LLC
Cards for a Cure
CBData™
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy
CrummeyService
Discuss Directives, LLC – Heart2Heart Workbook & Deck of Cards
DocuBank
Estate Planning Smarts / Pensworth
EstatePlanningBinders.com
Family Business Magazine
Florida Domicile Handbook
International Genealogical Search Inc.
Klark Proposal Software
Konica Minolta Business Solutions
Lawgic, LLC
LegacyQuest, LLC
Midwest Transaction Group
My Perfect Will
Oswald Companies Personal Excess Liability
Private Wealth Magazine
PS Awards
Ruby Receptionists
Sterling Cut Glass
The Ultimate Estate Planner
Trusts & Estates
WealthManagement.com

National Association of Estate Planners & Councils

Value Partners Supporting the 49th Annual Conference

Amicus Creative Media & Legal Vault
BizActions LLC
CBData™
CrummeyService
International Genealogical Search Inc.
Lawgic, LLC
My Personal Data Safe
Trusts & Estates

Visit "Value Partner Row" Within the Exhibit Hall Today!

National Association of Estate Planners & Councils

Speaker's Bureau Participants Added in 2012

Leonard Weiner, JD, AEP®
Mark C. Hartnett, JD, CFP®, AEP®
Alice L. Rokhar, Atty
Bill Boersma – *Exhibiting at conference!*
Michael Gregory
Laura Malone, CAP – *Exhibiting at conference!*
Eido M. Walny, Atty, EPLS, AEP®

National Association of Estate Planners & Councils

Publications Committee

Chair:

Charles V. Douglas

JD, CFP®, AEP®

National Association of Estate Planners & Councils

Publications Committee Members

Charles V. Douglas, JD, CFP®, AEP®, Chairman

Al W. King, III, J.D., LL.M., AEP® (Distinguished)
Larry Lehmann JD, AEP®
Susan Rounds, JD LL.M.(taxation), CPA, AEP®
Thomas D. Seck, JD LL.M.(taxation), AEP®
Martin M. Shenkman, CPA, PFS, MBA, JD, AEP®

NAEPC Journal of Estate & Tax Planning

NAEPC
Journal of Estate & Tax Planning

Search Issues

Current Issue | Previous Issues | Editorial Board | Media Kit

Third Quarter, 2012

NAEPC Journal of Estate & Tax Planning

Editor's Note: This "dinner menu" summary is designed to help you with the flavor of the article before you read more. If you are interested in the article, click its title to access a copy.

Breaking News

October 15-21, 2012 is National Estate Planning Awareness Week

Regular Columns and Reports

Editor's Column
Taxation Rules the Day
Author: Charles V. Douglas, JD, CFP®, AEP®

List of Conferences
2012-13 Conferences on Estate, Financial Planning

Third Quarter Update

Pitfalls in International Estate Planning- Potpourri of Topics and Problem Areas (PDF file)
Author: Leigh-Alexandra Basha

Published by:

National Association of Estate Planners & Councils

Sponsored by:

Ameriprise Financial

AB Bernstein Global Wealth Management
A unit of AllianceBernstein L.P.

COVENTRY
REDEFINING INSURANCE

Core Content Providers:

American College of Trust and Estate Counsel

CCH Estate Planning Review
(NAEPC Member Value Partner)

Steve Leimberg's Information Services

Trusts & Estates Magazine
(NAEPC Member Value Partner)

WealthCounsel

Edited by:

Charlie Douglas,

www.NAEPCJournal.org

National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning Mission

To offer a non-static resource where practitioners can easily access the best-in-class planning content across the various disciplines within the estate planning industry.

The *Journal* seeks to synergistically create a unique, one-stop, complementary, online estate planning resource.

National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning Facts

The ***Journal*** is published four times per year and is entirely internet based, with notices going out to affiliated local councils and Accredited Estate Planner® designees within *NAEPC News*.

Published almost entirely in a pdf format, the Journal is currently a complimentary resource and available to everyone on the World Wide Web.

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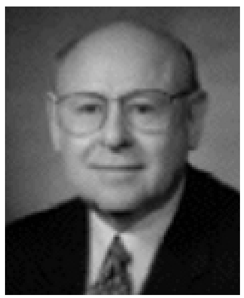
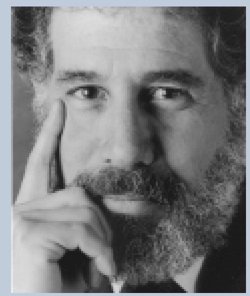
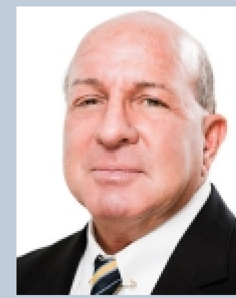
National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning Editorial Board





National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning Usage

<u>Traffic Soaring!</u>

As of September 30, 2012 the ***Journal*** had nearly **80,000** visits, double the amount of visits experienced during the same period of 2011.

	2009 Annual	2010 Annual	2011 Annual	2012 1st Qtr.	2012 2nd Qtr.	2012 3rd Qtr.
Visits	25,575	29,723	60,381	23,631	26,632	29,378

The Way We Research Issues and Seek Information Has Changed!!!

National Association of Estate Planners & Councils

NAEPC

NAEPC Journal of Estate & Tax Planning Cutting-Edge Content

Leimberg Information Services Inc.
Trusts & Estates Magazine
Commerce Clearing House's *Estate Planning Review*
WealthCounsel®
American College of Trust & Estate Counsel
AICPA
WealthManagement.com
Society of Financial Services Professionals

National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning 2012's Hot Topics

Estate Planning in 2012
Family Bank
Roth IRA Conversions
Reciprocal Trust Doctrine
Beneficiary Defective Inheritor's Trust (BDIT)
Questions re: Grantor Trusts
Trusts & State Income Taxes
Asset Protection

National Association of Estate Planners & Councils

NAEPC Journal of Estate & Tax Planning Get Involved!

Visit and Link to the ***Journal***

Share the ***Journal*** with your Members

Sponsor the ***Journal***

National Association of Estate Planners & Councils

Question & Answer Period and Closing Remarks

National Association of Estate Planners & Councils

Upcoming Activities

Lunch — Great Hall, North & Center

10:15 – 3:15pm — Be The Match Bone Marrow Donor Drive

1:00 - 5:00pm — Council Breakout Sessions by Size
- Small Councils ~ Scotland A
- Medium Councils ~ Scotland B
- Large Councils ~ Scotland C
- Administrators ~ Westminster

5:00 - 7:00pm — Welcome Reception with Exhibitors
Great Hall, North & Center