



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

ESTATE PLANNING DAY

in a **BOX**

Phase One Organizational Guide



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

ESTATE PLANNING DAY

in a BOX

Table of Contents

Phase 1: The Organizational Phase

| | |
|---------------|-------------------------------------|
| Tab 1 | Introduction |
| Tab 2 | Memo Template |
| Tab 3 | Committee Responsibilities |
| Tab 4 | Time Table |
| Tab 5 | Promotional Package |
| Tab 6 | Subcommittee Interest Letter |
| Tab 7 | Speaker Invitation Letter |
| Tab 8 | Registration Form |
| Tab 9 | Evaluation Form |
| Tab 10 | Sponsor “Thank You” Letter |



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 1





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Introduction

We are pleased to present Estate Planning Day in a Box materials for Phase One – the Organizational Phase. Within this section you will find materials to assist in organizing and form the foundation of a successful Estate Planning Day for your council. Phase One is a critical and important phase as it is the backbone of developing a successful event. It is important that each council understand the time and commitment that is involved in the organization of Phase One. We hope that you find the enclosed booklet useful in planning your own Estate Planning Day.

We also would encourage you to develop the Estate Planning Day Program in conjunction with the following professional organizations.

- **Local Bar Association**
- **Society of Financial Service Professionals**
- **Local Financial Planning Association**
- **State Society of Certified Public Accountants**
- **Trust Officers of Local Banks**
- **Chartered Life Underwriters / Local NAIFA Chapters**
- **Local Planned Giving Councils**

In addition to the professional organizations, you may also want to bring in your local community foundations, planned giving organizations, universities and colleges to encourage participation along with other professionals to expand awareness of Estate Planning Day in your community.



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 2





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

**EPC President
Address
City, State**

MEMO

TO: The Estate Planning Day Board
FROM: President, Estate Planning Council
DATE:
RE: Estate Planning Day

I would like to recommend our council to add Estate Planning Day as an item for our next meeting agenda. It would be important for us to have an Estate Planning Day in recognition of the National Estate Planning Awareness Week. To be successful, we will need the support of the Board and the Officers and we would also like to appoint a chair of the Steering Committee for Estate Planning Day at this meeting. The chair will be responsible for the organization of Estate Planning Day.

Regards

President

**Attachments:
Committee responsibilities list
Time Table**



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 3





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Estate Planning Day Committee Responsibilities:

Steering Committee:

1. Create and monitor budget
2. Decide who will handle secretarial work
3. Create a timetable for subcommittees (*see template*)
4. Check EPD date for community and holiday conflicts
5. Form subcommittees
6. Develop format of program with Programming committee
7. Determine speakers and topics
8. Write and send sponsor thanks
9. Create Evaluation forms (*see template*)

Facilities / Logistics:

1. Present and decide on possible locations
2. Check on availability
3. Determine if site is suitable
4. Determine all costs associated with the site and present
5. Find out all guarantees made by the site
6. Reserve the location
7. Procure insurance for the site
8. Print signs
9. Arrange exhibitor tables
10. Check on food arrangements
11. Arrange at door logistics
12. Place directional signs
13. Create map and directions for attendees

Sponsors:

1. Identify possible sponsors
2. Create timetable for procuring sponsors
3. Communicate with sponsors
4. Explain cost and benefits to sponsors
5. Create sponsor package and mail to sponsors
6. Sign up sponsors
7. Bill sponsors

Advertising and Publicity:

1. Determine costs
2. Determine which advertisers to use
3. Write press releases
4. Print brochures and inserts
5. Mail press releases



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Programming:

1. Identify topics and individual presenters for program
2. Approach and line up speakers
3. Approach volunteers
4. Receive all registrations
5. Gather all speaker presentations and handouts
6. Create labels and name tags
7. Coordinate handouts
8. Rehearsal
9. Arrange Insert
10. Sign up Insert writers

Web Page?

Possible Revenue:

1. Sponsorships
2. Underwriters
3. Admission
4. Tables at the event for rent

Possible Expense:

1. Administrative costs
2. Handouts
3. Brochures
4. Banquet
5. Table rentals
6. Signs
7. Media Ads
8. Photography
9. Answering Service
10. Committee lunches
11. Gifts
12. Ads
13. Contingency
14. Postage & mailing costs



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 4





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Estate Planning Day Time Table

| Task | Responsibility of: | Target Date | Date Completed |
|-----------------------------------|---------------------------|-----------------------------|-----------------------|
| Subcommittees formed | Steering committee | 10 months prior | |
| Facilities / Logistics | | | |
| Sponsorship | | | |
| Advertising | | | |
| Programming | | | |
| Publicity | | | |
| Newspaper Insert | | | |
| Web Page | | | |
| Subcommittees formed | Subcommittee chair | 10 months prior | |
| <i>Steering committee meeting</i> | Steering committee | 9 months prior | |
| Sponsors package developed | Sponsor committee | 8 months prior | |
| Location reserved | Logistics | 7 months prior | |
| Sponsors approached | Sponsor | 7 months prior | |
| Newspaper insert arranged | Newspaper | 7 months prior | |
| <i>Steering committee meeting</i> | Steering | 7 months prior | |
| Format of program developed | Steering / Program | 7 months prior | |
| Speakers / topics determined | Steering | 6 months prior | |
| <i>Steering committee meeting</i> | Steering | 6 months prior | |
| Sponsors approached | Sponsor | 5 months prior & continuous | |
| <i>Steering committee meeting</i> | Steering | 5 months prior | |
| Speakers lined up | Program | 4 months prior | |



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

| | | | |
|-----------------------------------|-----------------|----------------|--|
| Sponsors signed up | Sponsor | 4 months prior | |
| Sponsors billed | Sponsor | 4 months prior | |
| <i>Steering committee meeting</i> | Steering | 4 months prior | |
| Insert - writers signed up | Newspaper | 3 months prior | |
| <i>Steering committee meeting</i> | Steering | 3 months prior | |
| Press releases printed | Publicity | 3 months prior | |
| Brochures / insert printed | Publicity | 3 months prior | |
| <i>Steering committee meeting</i> | Steering | 2 months prior | |
| Press releases mailed | Publicity | 2 months prior | |
| Volunteers approached | Program | 2 months prior | |
| Insurance for site | Logistics | 2 months prior | |
| <i>Steering committee meeting</i> | Steering | 1 month prior | |
| Speaker handouts received | Program | 1 month prior | |
| Signs printed | Logistics | 1 month prior | |
| <i>Steering committee meeting</i> | Steering | 1 month prior | |
| Exhibitor tables arranged | Logistics | 1 month prior | |
| <i>Steering committee meeting</i> | Steering | Program month | |
| Food arrangements | Logistics | Program month | |
| Labels / name tags | Program | Program month | |



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

| | | | |
|-----------------------------------|-----------------|---------------|--|
| Handouts coordinated | Program | Program month | |
| | | | |
| <i>Steering committee meeting</i> | Steering | Program month | |
| | | | |
| Rehearsal | Program | Program month | |
| | | | |
| At door logistics | Logistics | Program month | |
| | | | |
| Directional signs placed | Logistics | Program month | |
| | | | |
| ESTATE PLANNING DAY | | Program month | |
| | | | |
| Debriefing | | Program month | |
| | | | |
| Sponsored thanked | | Program month | |



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 5





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Estate Planning Day Promotional Packages

Principal Sponsor \$5,000

\$3,000 Newspaper, \$2,000 Estate Planning Day

- Logo appears in all six Estate Planning Day promotional ads (ad series will run once a week for six weeks prior to EPD)
- Full page ad in 12-page newspaper insert – DATE
- Principal Sponsor recognition in Estate Planning Day program including opportunity for on-site corporate promotion

Major Sponsor \$3,500

\$1,750 Newspaper, \$1,750 Estate Planning Day

- Logo appears in three of six Estate Planning Day promotional ads in the newspaper
- Half page ad in 12-page newspaper insert - DATE
- Major Sponsor recognition in Estate Planning Day program including opportunity for on-site corporation promotion

Sponsor \$2,000

\$1,100 Newspaper, \$900 Estate Planning Day

- Logo appears in one of six Estate Planning Day promotional ads in newspaper
- Quarter page ad in 12-page newspaper insert – DATE
- Sponsor recognition in Estate Planning Day program including opportunity for on-site corporate promotion

Program Underwriter \$500

\$200 Newspaper, \$300 Estate Planning Day

- Named recognition in 12-page newspaper insert - DATE
- ****Business card advertisement in newspaper insert - add \$250****
- Sponsor recognition in Estate Planning Day program including opportunity for on-site corporate promotion



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 6





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

January 4, 2008

Name

Address

City, State

Dear ___:

The _____ Estate Planning Council is developing an Estate Planning Day scheduled for DATE. Estate Planning Day is an exciting and important showcase for the Estate Planning Council of STATE. Not only will this event educate the public about estate planning and highlight the existence of the Council; it will also promote the interaction of disciplines in forming a complete estate plan. Therefore, Estate Planning Day will benefit everyone involved.

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 this event. Second, I am seeking those who would like to participate in the planning and implementing of STATE's Estate Planning Day by joining one of the five subcommittees. The subcommittees are as follows:

- List subcommittees here and who they are chaired by
- List other subcommittees

Thank you for your consideration in joining us. Our goal is to have at least two people from each discipline represented on each subcommittee. If you have any questions or would like more information on the Estate Planning Day please call me at NUMBER or email me at EMAIL.

Sincerely,

Your Name



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 7





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Date

Name

Address

City, State

Dear _____:

As you know, the Estate Planning Council of STATE is sponsoring an upcoming Estate Planning Day. It is scheduled for DATE, and will be held in LOCATION.

You will find a tentative agenda and proposed press release attached. We are pleased to invite you to be one of our speakers. Because our time is limited and we are addressing the general public, the discussion will necessarily be short and general. The topic we hope you will address, from TIME, is:

TOPIC

If you wish to hand out written materials, please limit them to three pages in length. Please also let us know what format your presentation will be in.

All the members of the Estate Planning Council of STATE are encouraged to attend. We will wear identifying badges so that the public can identify us as estate planners and ask questions. In conjunction with Estate Planning Day, we are going to have an insert printed in the PUBLICATION, scheduled for DATE.

Please call or fax me as soon as possible to indicate that you will be able to participate. Thank you for your help.

Sincerely,

Your Name



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 8





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Estate Planning Day REGISTRATION FORM

Day and Date of EPD

Time of EPD

Location of EPD

Name(s):

Admission: \$10/person or couple in advance; \$15 at the door.

Address:

Fee enclosed:

Please make your check payable to:

Name

Address

City, State

Telephone:

Phone Number



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 9





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

Estate Planning Day Evaluation Form

We would appreciate your comments on the Estate Planning Day, because we hope to make this an annual event. Please tell us what you think.

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

| | | | | |
|--------------------------|------------------------------------|-------------------------------|-------------------------------|-------------------------------|
| Informative? | <input type="checkbox"/> Very Good | <input type="checkbox"/> Good | <input type="checkbox"/> Fair | <input type="checkbox"/> Poor |
| Well organized? | <input type="checkbox"/> Very Good | <input type="checkbox"/> Good | <input type="checkbox"/> Fair | <input type="checkbox"/> Poor |
| Answered your questions? | <input type="checkbox"/> Very Good | <input type="checkbox"/> Good | <input type="checkbox"/> Fair | <input type="checkbox"/> Poor |

2. Location of the Estate Planning Day:

| | | | | |
|-----------------------------|------------------------------------|-------------------------------|-------------------------------|-------------------------------|
| Directions to the location? | <input type="checkbox"/> Very Good | <input type="checkbox"/> Good | <input type="checkbox"/> Fair | <input type="checkbox"/> Poor |
| Ease of parking? | <input type="checkbox"/> Very Good | <input type="checkbox"/> Good | <input type="checkbox"/> Fair | <input type="checkbox"/> 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? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Get a "team" of professionals to assist you? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Learn the qualifications of your advisers? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Consider charitable giving techniques? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Consider insurance in your planning? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

5. How did you hear about the Estate Planning Day?

Additional Comments:

Name and Address (optional):



National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

TAB 10





National Association of Estate Planners & Councils

ESTATE PLANNING DAY

Phase One Organizational Guide

January 4, 2008

Sponsor
123 Bank Street
Anywhere, State

Dear _____:

On behalf of the Estate Planning Council of _____, and the Steering Committee, I want to thank "COMPANY" for your generosity in supporting this year's Estate Planning Day. The program was successful and allowed us to address topical issues for the benefit of the general public.

Enclosed for your file is a copy of the Estate Planning Day insert that appeared in the DATE issue of NEWSPAPER. The insert reached well over NUMBER households.

Thank you again for your generous support of the Estate Planning Day. I look forward to working with you again in the future to continue to highlight and emphasize the importance of estate planning.

Sincerely,

Your Name

Enclosures