November 2014

National Association of Estate Planners & Councils Minute

…the monthly administrative report for affiliated local council leaders

(This email is being sent to you as an **officer on record** or **administrator** for your NAEPC-affiliated local estate planning council, all officers on file receive the email. You are encouraged to share part or all of this publication with your entire membership. *NAEPC Minute* is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, which is sent to the members of those councils that have approved access through the Every Council Campaign. Past issues of *NAEPC News* can be found online at http://www.naepc.org/events/news.)

Please share this publication with your entire board at the next council board meeting.

IN THIS ISSUE

- Dues Notices Mailed
- January 8, 2014 Webinar, Please Share with Your Members
- 50th Annual Conference Recap

IN EVERY ISSUE

- 51st Annual Conference
- Benefits Available Members of Your Affiliated Local Council
- LinkedIn SubGroup for Council Leaders Only
- Officer Update Form

2014 Dues Notices Mailed ~

It's that time of year again – dues notices have been mailed, along with a request for an officer update! Please take some time to complete and return yearly dues and optional service fees by April 4, 2014. ***Please also make sure to return an officer update form (also found HERE) to ensure that we are communicating with the most current officers for your affiliated local council.***

The start of the year is also a great time to review your participation with NAEPC.

- Is your council in need of a website?
- Are you participating in the Every Council Campaign so that we can reach your members with NAEPC News, which provides a recap of all of the benefits, programs, and services available to council members?
- Has your council considered providing your members the valuable benefit of the Leimberg LISI Service, provided by NAEPC at a greatly reduced per-member fee?
- Are your members aware of the 30+ value partners that provide all members of affiliated local councils with benefits and services at greatly reduced fees?

If the questions above have you interested, we are here to help! Follow the hyperlinks in the text above or call the NAEPC office for more information.

January 8, 2014 Webinar ~

Information about the January 8, 2014 webinar has been provided below, please consider copying and pasting the text into a new email for your entire membership.

Please join us for the next webinar in the Robert G. Alexander Webinar Series:

January 8, 2014
3:00 pm - 4:00 pm ET

"The Hybrid Domestic Asset Protection Trust: a Third-Party Trust That Can Turn Into a Self-Settled Trust"

Expertise offered by:
Steven J. Oshins , JD, AEP® (Distinguished)
Program moderated by Paul S. Viren, CLU®, ChFC®, AEP®

About the program: The Domestic Asset Protection Trust has become one of the most widely-used asset protection techniques among asset protection professionals. The speaker will talk about a twist on the Domestic Asset Protection Trust that significantly increases the probability of successfully protecting the trust assets.

About the speaker: Steven J. Oshins is a member of the law offices of Oshins & Associates, LLC in Las Vegas, Nevada. He is rated AV by the Martindale-Hubbell Law Directory, is listed in The Best Lawyers in America and was named the Las Vegas Trusts and Estates Lawyer of the Year by The Best Lawyers in America. He has been named one of the 24 "Elite Estate Planning Attorneys" in America by The Trust Advisor, one of the Top 100 Attorneys in Worth, one of Southern Nevada's Best Lawyers in In Business Las Vegas, one of the Best Lawyers in America in the trusts & estates category in The American Lawyer, one of the Best Lawyers in America in the Tax Law category in Corporate Counsel, named Nevada Super Lawyer in the wills, trusts & estate planning category in Nevada Business Journal, named Nevada Super Lawyer in the estate planning & probate category in Las Vegas Life and named Mountain States Super Lawyer in the estate planning & probate category.

This is an intermediate/advanced program.

REGISTER NOW**!**

Continuing Education Credit
Continuing education credit will be available at each webinar for Accredited Estate Planner® designees. In addition, a certificate of completion will be made available for those professionals that feel the program satisfies their continuing education requirements and are able to self-file. Councils may also file the program in their home state for programs offered in a group setting.

Registration Fee
• $40 / Accredited Estate Planner® designee (dues must be current at the time of registration)
• $60 / member of an affiliated local estate planning council or at-large member of NAEPC
• $100 / individual non-member
• $250 / council meeting or group gathering (council dues must be current at the time of registration)

50th Annual Conference Recap ~
By every measure, our 50th Anniversary Conference was one of the most successful ever. We saw record attendance, with nearly 100 more participants than the previous year. Participant feedback was overwhelmingly positive with respect to programs, speakers and location. You can view a recap video of the 50th Annual Conference on our YouTube channel – enjoy!

The Council Leadership Day program was once again well received, and leaders very much appreciated the opportunity to share ideas with other councils of like size. Please visit our website to see what you missed!

This year, the conference also featured a past president's panel, and inducted several new members into our Estate Planning Hall of Fame®, awarding them the AEP® (Distinguished) designation. As usual, we featured some of the best and brightest minds in estate planning, who presented on relevant and timely topics of interest to our multi-disciplinary audience. Steven Leimberg also hosted a special session just for AEP®s, drawing record attendance.

51st Annual Conference ~

Of course, we now want to keep the momentum of the 50th Annual Conference going! We would like to continue to get the message out that our conference is not only for your local leadership, but for your entire membership as well. We often say that our conference is a "best kept secret" in estate planning conferences! Please plan on sending a council representative to San Antonio, on November 5th-

7th for our 51st Annual Conference. In addition, please work with your board to create a plan to make sure that all of your members receive the information, both through participation in the Every Council Campaign and by taking materials to your monthly meetings.

Our overriding theme will be multi-disciplinary teaming, which is also the singular focus of our organization's mission statement. Multi-disciplinary teaming is challenging. It requires a common vision, and shared values. There are issues with respect to team dynamics, communication and designating roles and responsibilities on the team. Our speakers will weave into their presentations how to build a high performing, multi-disciplinary team of designated professionals, who collaborate with one another to accomplish the ultimate purpose the wealth was designed to accomplish for the wealth holder, his or her family, and the institutions and causes they care most about.

We are very excited about our upcoming conference, and hope to see all of you there!!

Member Benefits, Programs & Services Recap ~

Members of the National Association of Estate Planners & Councils and members of your affiliated local council have access to a wide range of benefits, programs & services at reduced or no cost. These benefits are a great way to build upon benefits your council is already offering with no additional work on behalf of your board!

· New Benefits for Members of Affiliated Local Estate Planning Councils ·

2014 AICPA Advanced Personal Financial Planning Conference, January 20-22, 2014, Las Vegas

The 2014 AICPA Advanced Personal Financial Planning Conference is an intensive, high-level event that will help you prepare for the impact legislative and regulation changes will have on your practice and your clients. It's the first financial professional conference of the year that addresses changes head-on with the most advanced technical, all-encompassing learning programs for retirement, estate, investment, insurance and individual tax planning guidance for 2014.

Over the course of three intensive days, you will learn about the latest regulations, tax law changes and market outlook, and how to respond to pertinent issues that impact your practice — all in one advanced, all-encompassing conference. One thought-provoking session after another will address everything from tax policies to concentrated assets, insurance products and retirement plan design in addition to controversial topics such as Social Security, healthcare reform and Medicare.

Register online or download the brochure.

NAEPC members can take advantage of a special discount, creatively named "NAEPCPFP," which provides $100 off the onsite or online registration fees. This special offer can be combined with the AICPA member discount and the AICPA section discounts.

Special NAEPC Pricing for Webinar: After the FINAL IRS Regs...How Do You Advise Clients on The 3.8% "Net Investment Income Tax"?
(Not only individual clients, but trusts, estates, and closely held business entities too!)

If you have clients (or prospective clients) with sizeable income from interest, dividends, rents, capital gains or royalties, you can become a "hero" and their most talked-about advisor - if you can help them avoid the Affordable Health Care Act 3.8% Net Investment Income Tax that kicked in this year.

But it's not as simple as it seems. And even though the IRS has now finally issued its Final Regulations, it appears that this new tax is far more complex than originally thought.

Join us and nationally renowned tax expert, Robert Keebler, CPA, MST, AEP® Distinguished for a very special and timely 90-minute teleconference on Tuesday, January 14, 2014 at 9am Pacific Time (12pm Eastern Time) entitled "Understanding the 3.8% Net Investment Income Tax and Its Effect on Individuals, Trusts & Estates, and Closely Held Entities - After the Final Regs".

You need to know:

- How do you compute this §1411 Net Investment Income Tax?
- What is its application to C-Corps, S-Corps and Sub-K Partnerships?
- What is its application to Rental Income?
- What is its application to Trusts and Estates?
- What strategies can you use to reduce or eliminate the Net Investment Income Tax?
- How do the Final Regs differ from the Proposed Regs?
- What issues are still pending guidance (and what to tell clients)?

PROGRAM DETAILS:

- Program Title: Understanding the 3.8% Net Investment Income Tax and Its Effect on Individuals, Trusts & Estates, and Closely Held Entities - - After the Final Regs
- Date: Tuesday, January 14, 2014
- Time: 9am Pacific (10am Mountain, 11am Central, 12pm Eastern)
- Duration: 90 minutes
- Cost: $135 for NAEPC Members for Immediate Download /

Unable to participate on January 14th? $185 for NAEPC Members for Printed Materials & CD (plus shipping & handling)
Registration Includes: Participation on live teleconference (including Q&A), Handout Materials (if any), MP3 Audio Recording and a Certificate of Completion REGISTER NOW!

· Benefits for Members of Affiliated Local Estate Planning Councils ·

2-Part Webinar Series with Robert S. Keebler - Planning After the DOMA Decision
Acquire Seminar Marketing
Advisys Back Room Technician
AfterSteps
American Dream Planner Software
Amicus Creative Media
BizActions enewsletters for practioners
BVR's Guide to Business Valuation Issues in Estate & Gift Tax edited by Linda Trugman, CPA/ABV, CBA, ASA, MBA
BVR's Training Packs - Webinar recordings & transcripts
CBData Software to Simplify Your Life
CrummeyService, America's Leading ILIT Software Company
DocuBank: Emergency Access to Vital Documents
Estate Planning Smarts, A Practical, User-Friendly, Action-Oriented Guide, By Deborah L. Jacobs
EstatePlanningBinders.com
Family Business Magazine
Fiserv Investment Services
Florida Domicile Handbook: Vital Information for New Florida Residents
Heart2Hearts: Workbook and Deck of Cards
International Genealogical Search Inc.
Klark Proposal Software
Konica Minolta Business Solutions
Lawgic, LLC
LegacyQuest, LLC
Legal Binder Now (LBN)
LegalVault - Revolutionizing Attorney Document Storage
My Perfect Will
My Personal DataSafe LLC, the Nation's Most Comprehensive System for Sharing and Managing Client Information
Oswald Companies Personal Excess Liability
Private Wealth Magazine Subscription
Ruby Receptionists
The ABA Checklist for Family Heirs: A Guide to Family History, Financial Plans and Final Wishes

Sterling Cut Glass
The Charitable Planning Desk Reference for Advisors
The National Underwriter Company
The Ultimate Estate Planner, Inc.
Trusts & Estates Magazine
Wall Street-themed Greeting Cards
WealthManagement.com
Wolters Kluwer Law & Business

Please remember… all members must utilize a user name/password to access detailed ordering links and information. If your council has a website hosted through NAEPC and utilizes passwords, members can use the "I forgot my password" option to access the benefits page that appears right on your website. Other councils should contact NAEPC to obtain the appropriate user name and password combination for their council and must use the national site to access the benefits.

LinkedIn Sub-group for Council Leaders ~

NAEPC has launched a sub-group of the general association group on LinkedIn, just for council leaders. Join today to interact with other council leaders from across the country and to receive weekly posts from NAEPC! The sub-group is available only to officers and directors of affiliated local estate planning councils. See you there ~

Officer Update Form ~

All councils are encouraged to update NAEPC each and every time there is a change to the roster of officers. A fillable PDF file to do so can be found online at http://www.naepc.org/assets/national/pdf/council_officer_form.pdf.

National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114
(866) 226-2224 - fax (216) 696-2582
admin@naepc.org
The Association of Choice for Estate Planning Professionals