

*Please take a moment to complete this questionnaire. Your report will be posted on the “Estate Planning Day” tab of [www.naepc.org](http://www.naepc.org) so all councils can view the information and to assist those councils that are considering an event.*

Affiliated Local Estate Planning Council Name & Location	Name: Estate Planning Council of NE WI. City: Green Bay State: Wi
What date(s) did you/are you planning to hold your public estate planning day program? Was this timeframe chosen for a specific reason?	March 29 <sup>th</sup> , Apr 12 <sup>th</sup> , Apr 19 <sup>th</sup> , Apr 26 <sup>th</sup> May 3rd
Did you team up with any other professional associations or groups to host the event?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, please list:
Did you utilize the organizational materials or technical presentation provided by The NAEPC Foundation?	<input type="checkbox"/> Yes, we used the organizational materials <input type="checkbox"/> Yes, we used the technical presentation <input checked="" type="checkbox"/> We did not use either set of materials
Please tell us what made/makes your program unique or different.	5 2 hour classes on various topics of Interest to retirees. Classes held on UWGB campus 1-3PM
What was/is your biggest challenge in planning the program and how did you overcome it?	Organizing the topics to be taught and enlisting good instructors
How did you promote the event to the public?	Promoted through the Learning in Retirement Program Course listing and online
Did you charge a registration fee to attend?	<input checked="" type="checkbox"/> Yes, we charged \$ <u>10</u> to attend all 5 classes <input type="checkbox"/> The program was available free of charge
Did you provide your attendees take-away information?	<input type="checkbox"/> No <input type="checkbox"/> Yes, each presenter provided materials
Please note any information you feel would be valuable to those considering a program here...	Coordinate this type of program with the local university outreach office Many LIR offices on campuses
May interested councils contact your council with questions? If yes, please list the name, telephone and email for most appropriate person to receive request.	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes, please contact: Bob Fischer 920-632-7107 rfischer@absofin.com

Please attach the following to your submission:

- program outline/schedule
- budget (if available/willing to provide)
- related materials you feel would be helpful to councils considering a program

*Please return this questionnaire and related materials to [eleonor@naepc.org](mailto:eleonor@naepc.org).*