

Please take a moment to complete this questionnaire. Your report will be posted on the “Estate Planning Day” tab of 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 Tax Planning Council of Eastern Connecticut City: Mystic State: CT
What date(s) did you/are you planning to hold your public estate planning day program? Was this timeframe chosen for a specific reason?	Third week of October, the timing was/is convenient for presenters and we did not want to wait until winter season with poor weather.
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.	The first year, we had three presentations on the same day with different panel of presenters at three different locations. The second year we had a panel of presenters at one upscale retirement residence.
What was/is your biggest challenge in planning the program and how did you overcome it?	Finding a convenient location that would help increase the attendance. We worked hard with the retirement residence to show them this was a non-biased, non-sales oriented presentation.
How did you promote the event to the public?	The first year was in local newspapers and postings at the venues, i.e. a library. The second year was internal to the residence and they advertised it with their internal newsletters and postings.
Did you charge a registration fee to attend?	<input type="checkbox"/> Yes, we charged \$_____ to attend <input checked="" type="checkbox"/> The program was available free of charge
Did you provide your attendees take-away information?	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes, we provided the following materials: printed copies of the presentation
Please note any information you feel would be valuable to those considering a program here...	We feel that it has been a worthwhile event, not just for the public, but for the mission of our council. We are thinking of working in a partnership this year with a non-profit organization
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: Deborah Adam -401-348-1411

Please attach the following to your submission:

- program outline/schedule – I don’t have at the moment , but I will see if I can get it. We had a panel of presenters representing the disciplines of law, accounting, banking and non-profit who spoke on basic points of estate planning.
- 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.