

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: New Orleans Estate Planning Council City: New Orleans State: LA
What date(s) did you/are you planning to hold your public estate planning day program? Was this timeframe chosen for a specific reason?	We had eleven EPDs on Saturday mornings in early November. The last was November 2, 2002. The University Center at UNO was available to us then.
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 checked="" 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.	When we held our first EPD in 1991, we did not have any models to refer to. The University Alumni Assoc., a TV Channel, and various council member firms and banks underwrote or sponsored with us. We had three panels of 3 speakers each and were geared to the public for their information. We gave a handout that included the speaker outlines and forms for public use.
What was/is your biggest challenge in planning the program and how did you overcome it?	Funding! We had space donated and TV coverage in advance.
How did you promote the event to the public?	The TV station sponsoring with us provided advertising and some members were interviewed on camera. We advertised on public radio and mailed brochures to past attendees. Our members gave out brochures at their offices and banks.
Did you charge a registration fee to attend?	<input checked="" type="checkbox"/> Yes, we charged \$ <u>15</u> to attend <input 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: bound handouts (and pencils a few years)
Please note any information you feel would be valuable to those considering a program here...	Partner with local media! If you can, partner with a College or University that has space – and free parking – for 400 people.
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: Leila Schumacher (Exec. Dir) at LeilaSch@bellsouth.net or 504-895-8721

Please return this questionnaire and related materials to eleonor@naepc.org.