

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: Redwood Empire Estate Planning Council City: Sonoma County State: California
What date(s) did you/are you planning to hold your public estate planning day program? Was this timeframe chosen for a specific reason?	Various dates. We offer members as resources for local groups as a Speaker’s Bureau on estate planning topics.
Did you team up with any other professional associations or groups to host the event?	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes, please list: We coordinated with interested churches, non-profits and companies.
Did you utilize the organizational materials or technical presentation provided by The NAEPC Foundation?	<input type="checkbox"/> Yes, we used the organizational materials <input checked="" type="checkbox"/> Yes, we used the technical presentation <input type="checkbox"/> We did not use either set of materials
Please tell us what made/makes your program unique or different.	An organic process with relatively simple logistics and minimal cost.
What was/is your biggest challenge in planning the program and how did you overcome it?	Making a paradigm shift away from an “estate planning day” to moving to a Speaker’s Bureau concept. Once we piloted the Speaker’s Bureau concept we realized it was a successful model.
How did you promote the event to the public?	We sent letters to companies and non-profits letting them know about REEPC members’ willingness to be a resource for their organizations for speaking with little response. Instead we have had success with asking members to notify companies and non-profits they have a relationship with of our availability as an organization to provide speakers.
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: Listing of names and phone numbers by category of REEPC members.
Please note any information you feel would be valuable to those considering a program here...	The Speaker’s Bureau concept has moved beyond a pilot phase for REEPC and is one that we are expanding upon. It has been a successful model that can be supported over time with limited budget, overhead and logistics cost.
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: Sharon Zimmerman, CLU, ChFC 707-578-2477 or Beth Larssen, JD, 707-544-6776

Please attach the following to your submission:

- program outline/schedule

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

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

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