



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

EVERY COUNCIL CAMPAIGN

Program Outline & NAEPC Commitment

Program Outline

- Annual NAEPC Advanced Estate Planning Strategies Conference registration brochure (hard copy) will be sent via US mail
- NAEPC News emailed six times per year (past issues of this newsletter can be found at www.naepc.org/events/news)
- NAEPC News will inform your council members about the following items of interest:
 - ✓ Existing and new member benefit discount programs (a current list can be found on the "Benefits" page of www.naepc.org)
 - ✓ The Annual NAEPC Advanced Estate Planning Strategies Conference
 - ✓ The Accredited Estate Planner® & Estate Planning Law Specialist designations, the two NAEPC-Administered professional designations
 - ✓ Councils and/or members in the news
 - ✓ Timely and relevant items of interest to council leadership and members

NAEPC's Commitment to your council

- Strictly adhere to our privacy policy (a copy can be found at www.naepc.org/privacy.web)
- Respond to all notices of suspected misuse immediately with a full investigation
- Offer **every member** of **every participating council** an opportunity to "opt out" in a manner that will not impact the communication from the leadership of the affiliated local council
- Offer each participating council an opportunity to "opt out" each calendar year with a statement in the annual dues notice
- Offer each new council an opportunity to choose whether they will take part in the program
- Offer each non-participating council an opportunity to "opt-in" each calendar year with a statement in the annual dues notice

The Association of Choice for Estate Planning Professionals



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Acknowledgment / Authorization

(Please complete and return via US mail, fax or scan and email.)

Council Name: _____

Please select one of the following options:

_____ Our Board of Directors **HAS** authorized the NAEPC to reach our members via email six times per year and once per year via US mail. We understand we will be given an opportunity each year with the annual council dues notice to review this decision and withdraw our permission if desired. Please choose one of the options below to transfer your data.

_____ Our Council has a Level II, III or IV NAEPC-hosted website and we authorize the NAEPC to obtain the first name, last name, mailing and email addresses for each of our members from that site.

_____ Our Council has a landing page and I am emailing the first name, last name, mailing and email addresses in an **EXCEL** file (a template is available) to councilservices@naepc.org. Please include council name and your contact information in the subject line of your email.

_____ Our Board of Directors **HAS NOT** authorized the NAEPC to reach our members via email six times per year and once per year via US mail. We understand that we will be given an opportunity each year with the annual council dues notice to review this decision and offer our permission if desired.

Signature of Council Officer

Date

Printed Name of Council Officer

Position of Council Officer

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