

# **NAEPC – Small Council Session**

Wednesday, November 17, 2010

## **Facilitators**

Bob Fox

Sandra Zehntner

Number of participants in session: approximately 25

Summary Notes of Discussion

## **Members**

Dues reported range from \$100/yr with a per meeting fee to \$350/yr with 7 meetings and a social included. It was noted that approximately 2/3 of the membership attends if meetings are included in the dues. The reported per meeting fees ranged from \$30 - \$50.

During the discussion re: membership categories, it was noted that an associate membership is sometimes available for “non-traditional” types of disciplines.

It was noted that some councils struggle with an increasing number of attorney members.

## **Meetings**

The group was nearly evenly split between breakfast, lunch and dinner meetings.

Of the councils present, some indicated that new events have recently been implemented. Those events include a public education presentation, social event, golf tournament, and an estate planning day program.

Some councils communicate the benefits, programs and services offered to local members by NAEPC at every meeting.

No councils have a media chair.

One council noted a recent event at an art gallery and another at the local Humane Society.

## **Sponsorship**

Some councils noted that sponsorships are collected to cover the cost of the website, or to provide additional services to the general membership. Fees collected range from \$200 - \$1,000, depending on the type of support, etc.

Contacts within the councils are used to find sponsors, some councils solicit their general membership for sponsors, etc.

Most often trust companies, financial planning groups and appraisal firms take advantage of the opportunity.

## **EPC Mgt and Planning**

7 councils present employ a professional administrator.

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### **AEP designation**

8 councils present are using the Council Nominated AEP program.

### **NAEPC – Website**

Of the participants, 8 councils have a level 2 website hosted through NAEPC , 3 have a level 3 site hosted through NAEPC and 1 has a level 4 website.

### **Estate Planning Day**

Some councils reported that they have hosted this type of event, sometimes in conjunction with a local college or university.