

National Association of Estate Planners & Councils 46th Annual Conference
Small Size Council Breakout session on Council Leadership Day
November 11, 2009

Moderators – Robert E. Fox, CLU, AEP® ~ EPC of Marion County FL & Lawrence W. Lehmann, JD of New Orleans EPC

Membership Issues

Affiliate membership categories for one council included bankers, senior service professionals and certified art & antique appraisers.

Creating value is a must to growing membership numbers/counts.

It was noted that sample bylaws can be found on naepc.org in the referral lists and documents section.

Many chapters are offering various types of continuing education credit to entice members.

Offer a “member moment”, an opportunity for members to speak for 1-2 minutes at the regular meetings of the organization.

Sponsorships

Range - \$200 - \$1000

Some councils allow sponsors microphone time and the option of passing out collateral materials.

Annual sponsorships are available for an increased fee, offers ability for placement throughout the year.

Educational Programming

Councils look to a potential speaker’s resume rather than designations for background information.

Programs vary in set up and length, including half-day seminars, continuing education driven, public estate planning day events and strictly social functions.

Some councils exclude board members from the potential pool of speakers.

One council noted that changing their programs from dinner to lunch increased attendance by 50%.

Administration & Board Structure

Councils present indicated that administrators are used on a part time basis for duties such as dues invoicing, website maintenance, etc. Fees varied.

Several councils noted a media chairman or publicity contact for the group.