

NAEPC

Foundation



2007 SPONSORSHIP BENEFITS PACKAGE

THE NAEPC FOUNDATION

The NAEPC Foundation is a Section 501(c)(3) tax-exempt educational foundation established by The National Association of Estate Planners and Councils (NAEPC) in 2005 to educate both the public and estate planning professionals.

Our Mission and Purpose:

- ✓ To educate the public regarding the benefits of the multi-disciplinary team concept of estate planning as espoused by the National Association of Estate Planners & Councils;
- ✓ to develop educational programs regarding estate planning for estate planning professionals;
- ✓ to develop and promote a community outreach program for the general public; and
- ✓ to hold educational conferences, seminars, forums, and meetings regarding estate planning.

Education for the Public:

Have you ever heard anyone say? “I’m too young to do estate planning I don’t need to worry about that until after I’m in my sixties,” or; “All my property is titled in joint tenancy with my spouse so I don’t need a will,” or; “Estate planning is only for the super rich,” or; “Estate planning is too complicated and expensive,” or; “Doesn’t the government provide for that?,” or; “We did our wills right after we got married 30 years ago and see no need to change anything or do further planning.” I’m sure we have all heard similar phrases, comments and misconceptions about estate planning over the years. What misconception is your favorite?

Our objectives with regard to our outreach to the public are to educate the public on: What is estate planning; Why estate planning is so important and the reasons to do estate planning; and, The professional team of estate planners available to assist individuals with their estate plans. In the process we want to correct the misconceptions about estate planning, some examples which are stated above, and to emphasize the team approach to estate planning.

The NAEPC is the only organization that represents the entire profession of estate planning. Through our over 185 affiliated Councils we have over 26,000 members. We believe that The NAEPC Foundation is the most logical organization to take on this cause of educating the public about estate planning. But we cannot do this alone and we will need a lot of help.

Our mission will be accomplished by offering media and internet-based publications, through newspaper and magazine ad and publicity campaigns, by utilizing public television to create and distribute programs intended for “Mary & John Q. Public” and by helping our 185 plus affiliated local estate planning councils understand and plan successful community Estate Planning Day programs.

Education for Estate Planning Professionals:

The NAEPC Foundation, together with the National Association of Estate Planners & Councils (NAEPC), hosts a yearly Annual Conference in cities and resort locations across the country. This event offers one full day of leadership development (Council Leadership Day) for officers of our local councils and two full days of cutting-edge technical education for professional estate planners within the disciplines practicing in the estate planning field. Participants in these conferences have given us rave reviews, with such comments as “Best overall conference in estate planning,” “This is better than Heckerling or Notre Dame,” “The Council Day gave us valuable insights about the many benefits and services of NAEPC and great ideas that we will take back to our Council.”

The *NAEPC Journal of Estate & Tax Planning* (www.naepcjournal.org) is an internet-based publication that was started last year to provide the estate planning professional with the latest developments and current trends and analysis on topics relevant to the practice of estate planning. The NAEPC Foundation also sponsors educational seminars and audio conferences for estate planning professionals.

Sponsorship Opportunities:

On the pages that follow in this brochure I am pleased to present you with the sponsorship support benefit options and opportunities, and hope that you will choose to help us make a difference in the years to come!

Gary L. Flotron, MBA, CLU, ChFC, AEP
President and Chair
The NAEPC Foundation

ABOUT THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

Formed in 1962 and incorporated in 1963 as a non-profit business league by 13 estate planning leaders from nine Councils, the National Association of Estate Planners & Councils (NAEPC) is comprised of 185 plus affiliated Estate Planning Councils with approximately 26,000 members focused on establishing and monitoring the highest professional and educational standards. NAEPC supports the team approach to estate planning by involving multiple professional disciplines (law, accounting, insurance, trust, valuation, financial planning and charitable planning) to better serve the public's need. It is our belief that this system of offering estate planning advice to communities helps continue businesses, and thereby saves jobs and benefits our economy locally, regionally and nationally. It helps avoid family tragedy from intestacy and poor tax planning, promotes private philanthropy through the creation of charitable trusts and foundations, improves our educational advances, funds medical science discoveries, supports the arts, provides poverty relief, and generally enriches society in a way that is the envy of the world.

Our Mission:

It is the Mission of the National Association of Estate Planners & Councils (NAEPC) to: Promote the multi-disciplinary approach to estate planning by supporting local Estate Planning Councils and their members and by encouraging the formation of new Councils.

To that end we are committed to:

- Encourage attainment of the Accredited Estate Planner (AEP) designation by qualified estate planning professionals.
- Support efforts of The NAEPC Foundation to increase public awareness of the importance of estate planning by a team of professional advisors.

Our Vision:

The National Association of Estate Planners & Councils (NAEPC) will be the association of choice for professionals engaged in the practice of estate planning because:

- Unsurpassed education and networking opportunities are provided by attending local Council meetings and NAEPC's Annual National Conference; and
- The public demands that its estate planners bear earned and recognized credentials, and the Accredited Estate Planner (AEP) designation conferred only by NAEPC is among the few designations that meet that qualification.

Accredited Estate Planner (AEP) Designation:

The Accredited Estate Planner (AEP) designation is a graduate level accreditation in estate planning obtained in addition to already recognized professional credentials within the various disciplines of estate planning. It is awarded by the NAEPC to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character.

The NAEPC has set high standards for eligibility with respect to training and comprehensive experience in estate planning and the NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards. General information about the designation, as well as requirement details and an application, can be found online at www.naepc.org.

Further Information:

For more information on The National Association of Estate Planners & Councils, The NAEPC Foundation and the Accredited Estate Planner designation please go online to www.naepc.org.

INVESTOR

one who uses, gives, or devotes, as for a purpose or to achieve a goal

Level of Support \$50,000/year

Benefits Opportunity to sponsor the NAEPCs Annual Conference (**Gold Level**) during the year of contribution

Opportunity to provide NAEPC Foundation with a one-year member on the NAEPC Foundation Advisory Board

Company recognition during public television broadcast (if applicable during the year of support)

Company logo noted prominently as “Investor” on NAEPC Foundation page of www.naepc.org

Recognition in all NAEPC newsletters and in *NAEPC Journal of Estate & Tax Planning*

Benefits are negotiable with contributions over \$10,000 (in compliance with Federal tax laws).

BUILDER

someone that creates something from the foundation up

Level of Support \$25,000/year

Benefits Opportunity to sponsor the NAEPCs Annual Conference (**Silver Level**) during the year of contribution

Opportunity to provide NAEPC Foundation with a one-year member on the NAEPC Foundation Advisory Board

Company recognition during public television broadcast (if applicable during the year of support)

Company logo noted as “Builder” on NAEPC Foundation page of www.naepc.org

Recognition in all NAEPC newsletters and in *NAEPC Journal of Estate & Tax Planning*

Benefits are negotiable with contributions over \$10,000 (in compliance with Federal tax laws).

VISIONARY

one who has visions; a seer

Level of Support \$10,000/year

Benefits Opportunity to exhibit at the NAEPCs Annual Conference during the year of contribution

Company recognition during public television broadcast (if applicable during the year of support)

Company logo noted as “Visionary” on NAEPC Foundation page of www.naepc.org

Recognition in all NAEPC newsletters and in *NAEPC Journal of Estate & Tax Planning*

Benefits are negotiable with contributions over \$10,000 (in compliance with Federal tax laws).

SUPPORTER

an adherent, follower, backer, or advocate

Level of Support \$5,000/year

Benefits Company name noted as “Supporter” on NAEPC Foundation page of www.naepc.org

Recognition in all NAEPC newsletters and in *NAEPC Journal of Estate & Tax Planning*

NAEPC Foundation Contributor (2007) COMMITMENT FORM

Please check your desired level of support...

Commitment Level	Amount	Participate in Annual Conference?
Investor	\$50,000	Yes / No
Builder	\$25,000	Yes / No
Visionary	\$10,000	Yes / No
Supporter	\$5,000	NA
Other (complete amount)	\$	NA

Company Contact Information (please print clearly)

Company name exactly as it should appear on ALL materials

Contact Name _____
 Telephone Number _____ E-Mail _____
 Fax Number _____
 Address _____
 City, State & Zip Code _____

Our specialty is (check one):

Accounting Financial Planning Life Settlements
 Banking Insurance Trust Services
 Business Valuation Law Other: _____

Promotional Item Contact Information

Company Name _____
 Contact Name _____
 Telephone Number _____ E-Mail _____
 Fax Number _____
 Address _____
 City, State & Zip Code _____

Payment Information

\$ _____ enclosed.

OR

Bill credit card number _____ Exp. Date _____
 Amount _____ Name as it appears on card _____
 Signature _____