



# NAEPC NEWS

Visit the NAEPC at:

<http://www.naepc.org/>

## WELCOME TO THE FIRST NAEPC NEWSLETTER

Vol. 1, Issue 1, July 2004

We hope you enjoy our newsletter. Our purpose is to provide you and your local council with up-to-date information about the activities of the NAEPC and local councils.

First, I would like to personally invite you to consider coming to Atlanta October 27 through 29, 2004, to attend and participate in the 41<sup>st</sup> Annual Conference. The speakers are the most impressive group ever! A brochure is available on our website, <http://www.NAEPC.org>.

Major changes were made in the Accredited Estate Planner (AEP) designation this past year to make the designation available to highly qualified professionals with 15 years or more experience without the necessity of taking an examination. If you already hold an AEP designation, we urge you to nominate your highly qualified business associates for the designation. The reasons to be an AEP are many.

We owe it to the profession and to the public to support the designation and make it the premier multidisciplinary designation for estate planners. Increasing the number of AEPs will make it possible for us to better promote the designation nationally.

Public inquiries resulting from estate planning articles prepared by the NAEPC and published in newspapers throughout the country are referred to AEPs in their areas.

In the future, only AEPs will be designated as qualified speakers on the NAEPC website.

The NAEPC website assists the public by listing AEPs by locality and discipline.

We urge your local council to investigate the many benefits of NAEPC affiliation. Affiliated councils may send representatives to the national conference to participate in Council Day. Council Day affords council representatives from around the country the opportunity to interact, share ideas, and learn ways to make your council better serve its members in the community. Affiliation provides other benefits:

Your council can obtain an NAEPC sponsored website which will facilitate coordination of council events, notices, dues collections, and council member interaction.

Through an affiliation between the NAEPC and Leimberg Information Services (LIS), your members can have unlimited access to the Leimberg Information website ([Leimbergservices.com](http://Leimbergservices.com)). This service makes available all Leimberg research materials and information at a cost not otherwise available to the public. Visit the website one time for free....  
Continued on page 4.

**From the President,  
Steve McDaniel,  
Memphis, TN**



*"Please forward this e-mail newsletter to your council officers and directors and to your estate planning members. Thanks, Steve."*



**Come to Atlanta for the 41st Annual Conference**

For More Information:

<http://www.naepc.org/convention.web>

### Estate Planning Councils

**DID YOU KNOW? .....THE NAEPC CAN PROVIDE:**

- *Web Site Packages*
- *Local Council Nominated Accredited Estate Planners*
- *Discounted Leimberg Access, Trusts and Estate Magazine subscriptions and Planning Software*



## NAEPC NEWS

### Come to the 41st Annual NAEPC Conference

From October 27th to October 29th, 2004, the 41st Annual NAEPC Conference takes place at the Renaissance Waverly Hotel in Atlanta Georgia. With Jonathan Blattmachr, JD, Stephen Leimberg, JD, Jeffrey Pennell, JD, and Stacy Eastland, JD and others discussing the current topics in Estate Planning, the nature of planning and marketing estate planning in these changing times, and addressing portfolio management in wealth planning in today's world.

[Find Out More: http://www.naepc.org/convention.web](http://www.naepc.org/convention.web)

### Become an Accredited Estate Planner

*Professional estate planners can now achieve an accreditation that acknowledges their experience and specialization in estate planning!*

An **Accredited Estate Planner<sup>SM</sup>** is a person who has earned a graduate level specialization in estate planning designation in addition to already recognized professional credentials within the various disciplines of estate planning.

It is awarded by the National Association of Estate Planners & Councils<sup>SM</sup> to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation and character. An **Accredited Estate Planner<sup>SM</sup>** must embrace the team concept of estate planning and adhere to the NAEPC's<sup>SM</sup> professional code of ethics.

As a part of the NAEPC's<sup>SM</sup> advocacy program, **Accredited Estate Planners<sup>SM</sup>** will be given priority in requests for referrals within each professional discipline that result from NAEPC<sup>SM</sup> promotion and advertising campaigns. In addition, NAEPC<sup>SM</sup> promotions will prominently feature the AEP<sup>SM</sup> designation and the advantages of working with an AEP professional.

[More Details: http://www.naepc.org/estate\\_planners.web](http://www.naepc.org/estate_planners.web)

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Come to Atlanta for the 41st Annual Conference

COME TO "COUNCIL LEADERSHIP DAY" AT THE NAEPC ANNUAL CONFERENCE

- Meet other councils
- Meet the NAEPC leaders
- Share ideas
- Leadership development

*"Please forward this e-mail newsletter to your council officers, directors and your estate planning members."  
Thanks, Steve McDaniel,  
President, NAEPC.*

### Do You Need a Speaker?



**President Steve McDaniel speaks often around the US**

The NAEPC can help your local Estate Planning Council find a speaker. With our Speaker's Bureau, we can help you find a local speaker to speak to your Council on a wide range of estate planning topics. Searchable by state, keyword or name, our Speaker's Bureau is there to assist in building a dynamic program for your local Council. Visit us at the site noted below, and enter a state, or keyword topic, or speaker name and hit Search. A list of potential speakers will show:

If you would like to be part of the NAEPC Speaker's Bureau, please contact us.

To remove your name from our mailing list, please [click here](#).

Questions or comments? E-mail us at [admin@naepc.org](mailto:admin@naepc.org) or call (866) 226-2224



# NAEPC NEWS

## Estate Planning Councils in the News

Vol. 1, Issue 1, July 2004

- Atlanta, GA: The Estate Planning Council of North Georgia and the Atlanta Estate Planning Council are proud to host the NAEPCs 41st Annual Conference.
- Cleveland, OH: The Estate Planning Council of Cleveland recently recognized its 4th Annual "Distinguished Estate Planner" at an event on June 8th. Jeffrey Weiler is a partner in the Cleveland and Columbus law firm of Benesch, Friedlander, Coplan & Aronoff LLP was chosen for his years of distinguished service to EPC Cleveland and to the field of estate planning. Mr. Weiler joins past recipients P. Thomas Austin (2001), J. Donald Cairns (2002) & Robert M. Brucken (2003). For more information call the EPC Cleveland office at (216) 696-1228.
- Seattle, WA: The Estate Planning Council of Seattle sponsored and published its second annual Estate Planning and Charitable Bequests Supplement in the Puget Sound Business Journal. It was informative to the public, raises the image of the EPC too. Find out more:

<http://www.epcseattle.org>

## Benefits of Council Membership in the NAEPC

Local Council membership in the NAEPC brings many benefits of membership including (1) a contact with the National organization to facilitate the exchange of ideas and information between councils, (2) discounts for the Leimberg Newsletter services, (3) discounted subscriptions for Trusts and Estates magazine, (4) discounted subscriptions to the Kettley estate planning software products, and (5) information on public relations efforts plans. Find out more:

[http://www.naepc.org/member\\_services.web](http://www.naepc.org/member_services.web)



Come to ATLANTA for the 41st Annual Conference

**GET READY FOR THE  
2005 NAEPC 42nd  
ANNUALCONFERENCE**

**Save the Date!**  
**42ND Annual Conference**  
September 14-16, 2005  
Grapevine, Texas  
(Halfway between Dallas and Fort Worth)  
Co-hosted by the Estate Planning Council of North Texas

## Do You Need a Book for your Clients?



The NAEPC through the Estate Planning Council of Seattle can provide you with three estate planning booklets for your clients, including Estate Planning, 5th Edition; The Fiduciary's Handbook, 2nd Edition, and Dealing with the Death of A Loved One. Members of the EPC of Seattle wrote the booklets from the State of Washington perspective (a community property state), but is designed to provide background to clients to facilitate the estate planning process so it could still be useful for you clients and facilitate the estate planning process.

If you would like to purchase the booklets please visit :

"Estate Planning, 5th Ed"

[http://www.epcseattle.org/public\\_purchasepublication.php](http://www.epcseattle.org/public_purchasepublication.php)

To remove your name from our mailing list, please [click here](#).

Questions or comments? E-mail us at [admin@naepc.org](mailto:admin@naepc.org) or call (866) 226-2224



# NAEPC NEWS

**WELCOME TO THE FIRST NAEPC NEWSLETTER, cont.**

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Continued from page 1:

Discounts are available for books, magazines, and software, including Kettley estate planning products.

Affiliated councils can nominate qualified members to receive the AEP designation at a reduced cost.

I look forward to meeting you in Atlanta and solicit your participation as an active member of the NAEPC.

Very truly yours,

Stephen McDaniel, President, National Association of Estate Planners and Councils



Come to ATLANTA for the 41st Annual Conference

## Benefits of Council Membership in the NAEPC: the Local Council-National Connection

Local Council membership in the NAEPC brings many benefits of membership including a contact with the National organization to facilitate the exchange of ideas and information between councils across the nation.

- ◇ Do you need speakers for your meetings?
- ◇ Do you need ideas on running a conference?
- ◇ What does it take to co-sponsor the NAEPC Annual Conference?
- ◇ What are some good topics to have covered at a meeting or conference?

Contact the NAEPC offices or the NAEPC Board Member that serves your area of the country for any assistance that you need. We are there for you.

See Page 5 for our Officers and Board Members and the states that they represent.

"Let us know what we can do for you! Check in with your NAEPC contacts" See Page 5.

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(Dallas/Fort-Worth Area)

**"Please forward this e-mail newsletter to your council officers, directors and your estate planning members."  
Thanks, Steve McDaniel,  
President, NAEPC.**



# NAEPC NEWS

## Benefits of Council Membership in the NAEPC: the Local Council-National Connection, continued

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Contact the NAEPC offices or your NAEPC Board Member that serves your area of the country. Our Directors are:

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