

January 2018 Issue

# National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

**This monthly email is being sent to you as an officer or council executive for your NAEPC-affiliated local estate planning council, all officers on file with NAEPC receive the email.** *NAEPC Minute* is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, which is sent to the members of those councils that have approved access through the [Every Council Campaign](#). Past issues of *NAEPC News* can be found [HERE](#). Please contact the national office if you have questions about your council's status within the Every Council Campaign.

Please share this publication with your entire board at its next meeting or forward it via email if a meeting is not scheduled soon.

**Dues notices have been mailed!** Please complete and return your dues & service orders and an [officer update](#) by March 16, 2018. Thank you!

## HIGHLIGHTS

- Year-End Survey
- Welcoming New Committee Members
- Council of Excellence Award & Application
- Regional Leadership Day – June 2018 – California & Washington
- NEW! Advanced Education in Multi-Disciplinary Teaming – LINK: Online Training Course

## IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference – November 6 - 9, 2018
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form / Collecting Formation Dates
- Council Leadership Group on LinkedIn

Scan this message for **[HOT TOPICS]**!



## 2017 Survey of Councils

We request your input on a survey intended to gather information about your council's favorite speakers and topics from 2017, what your Estate Planning Council is doing, and how you are doing it, so that we can share those details with other councils. After the results have been collected we will be posting them on our website and believe that the information gathered will provide great insight and guidance for all of the councils affiliated with NAEPC. **[HOT TOPIC]** We ask one board member from your council to take a moment to complete the brief 9-question survey found at <https://www.surveymonkey.com/r/6T5TR7X> by **March 16<sup>th</sup>**.

>[Learn more about what other councils are doing and how they are doing it by reviewing notes from Regional Leadership Day and Council Leadership Day](#)

## Welcoming New Committee Members

The Council Relations Committee is growing! We are excited to have welcomed over ten new volunteers in the past several months and are appreciative of their service, as well as that of those who are returning to the committee. > [See the full list of committee members](#) or [consider volunteering with NAEPC](#)

### **Council of Excellence Award and Application**

**[HOT TOPIC]** The 2018 Council of Excellence Application will be available online soon. Watch your email for more details.

### **Regional Leadership Day**

We are hard at work planning the 2018 Regional Leadership Day programs. **[HOT TOPIC]** Late-June dates will be released shortly for events in Anaheim, the San Francisco area and Tacoma/Seattle. All councils within a reasonable distance of these cities are encouraged to send multiple board members; a block of rooms will be available for those in need of overnight accommodations. > [Learn more about Regional Leadership Day](#) or [read the notes from the 2017 programs](#)

### **Advanced Education in Multi-Disciplinary Teaming – LINK: Online Training Course**

**[HOT TOPIC]** We are excited to announce our newest member benefit – the LINK online training course in collaboration! Launched in late 2017 in conjunction with Todd Fithian and The Legacy Companies, LINK provides easy and on-demand access to advanced education built around our core value, the team approach to estate planning. This fun and interactive self-paced course is available to Accredited Estate Planner® designees for just \$100\* and estate planning council members for \$169. > [Learn more about LINK](#) or [watch the program introduction](#)

Your council's help in making sure your membership is aware of this new benefit is appreciated!

*\*Sign in to the AEP Login area of [www.NAEP.org](http://www.NAEP.org) or contact the NAEPC office to obtain the AEP® discount code.*



### **55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders · EDUCATION & COLLABORATION**

November 6-9, 2018 · Ft. Lauderdale, Florida

The [55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 6 – 9, 2018 in Ft. Lauderdale and it's never too early to plan to attend and to start sharing details about the conference with the members of your council.

Attendees will experience everything the NAEPC Advanced Estate Planning conference is known for – good company, great food and exceptional educational content, access to new technology, tools and firms in the exhibit hall – **[HOT TOPIC]** with exciting changes like an additional half day of educational content, more continuing education credit, a little extra free time, and a revamped approach to Council Leadership Day. Speakers and topics will be released soon and registration opens April 2017! Mark your calendar today!

### **Robert G. Alexander Webinar Series ·**

The Robert G. Alexander Webinar Series provides councils and their members with accessible, affordable, multi-disciplinary education. Programs are available live and on-demand to watch at your leisure and attendees can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Upcoming Programs > [For more details and to register online](#)

Wednesday, February 14, 2018 · Non-Tax Developments of Interest to Estate Planners: An Overview of Recent Cases of Significance for all Estate Planning Professionals with Jeffrey N. Pennell, JD

Wednesday, March 14, 2018 · High Tax Free Compounded Returns: The Keys to Building Wealth and Accomplishing Great Financial Planning with Jonathan G. Blattmachr, Esq., AEP® (Distinguished) and Jeff Glickman

Registration Fees	Individual	Series
Accredited Estate Planner® Designee	\$40	\$280
Junior / Student (Junior or Student member of an affiliated EPC or one who is in the process of attaining the AEP® designation by virtue of being enrolled in a required or elective course at The American College)	\$40	\$280
Member of Affiliated Estate Planning Council / At-Large Member of NAEPC	\$60	\$420
Non-Member	\$100	\$700
Group Gathering (one feed shown in a single location to a group, additional feeds available for \$25)	\$250	\$1,125

Continuing education credit is available at each NAEPC-hosted webinar for Accredited Estate Planner® designees. In addition, a general certificate of completion will be made available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.

#### Member Benefits ·

Members of your affiliated local council have access to a wide array of benefits at reduced or no cost. These offerings are a great way to build upon benefits your council is already offering with no additional work on behalf of your board! Please be sure to mention these valuable services at every council meeting, whether verbally or in print, in dues and regular mailings. **Brochures are available that can be customized to your council or printed as-is, contact the national office for more details or see a sample [HERE](#).**

Click on the links below to browse the list of all by category, or see the [full list of opportunities](#).

-  [Marketing and Website Design Services](#)
-  [Educational Opportunities](#)
-  [Subscriptions and Publications](#)
-  [Programs and Services for Council Development](#)
-  [Software](#)
-  [Presentation Materials and Office Supplies](#)
-  [Complimentary Resources](#)
-  [Discipline-Specific Information](#)
-  [Other Benefits, Programs & Services](#)

Please remember... all members must utilize a user name/password to access detailed ordering links and information. If your council has a website hosted through NAEPC and utilizes passwords, members can use the "I forgot my password" option to access the benefits page that appears right on your website. Other councils should contact NAEPC to obtain the appropriate user name and password combination for their council and must use the [national site](#) to access the benefits.

### **Officer Update Form / Formation Dates ·**

All councils are encouraged to update NAEPC each and every time there is a change to the roster of officers. A fillable PDF file to do so can be found [online](#).

We are currently collecting a formation date for all Estate Planning Councils affiliated with NAEPC. If you have not already done so, please take a moment today to email your council name and date of formation to [councilservices@naepc.org](mailto:councilservices@naepc.org). **Thank you!**

### **Staying Connected Via LinkedIn ·**

*Does your council want to ask other councils for advice? Looking for ideas for programming?*

NAEPC maintains a sub-group of the primary association group on LinkedIn just for council leaders. Join today to interact with council leaders from across the country, initiate and participate in council management-specific dialogue, and to receive regular posts from NAEPC! The sub-group is available to current officers and directors of affiliated local estate planning councils. Click [HERE](#) to join (you must have a LinkedIn account to participate.)

National Association of Estate Planners & Councils

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

(866) 226-2224 - fax (216) 696-2582

[admin@naepc.org](mailto:admin@naepc.org)

*The Association of Choice for Estate Planning Professionals*