

January 2019 Issue

## National Association of Estate Planners & Councils Minute

· the monthly administrative newsletter for affiliated local council officers ·

This 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. 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!**

The mailing and accompanying cover letter contains important information, including notice of a [bylaw change](#). Please complete and return your dues & service orders by March 15<sup>th</sup>. Thank you!

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

### HIGHLIGHTS

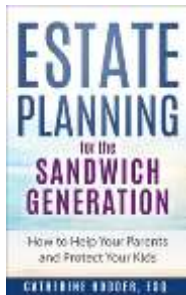
- New & Refreshed Member Benefits

### IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference · November 5 - 8, 2019, Las Vegas
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



### New & Refreshed Member Benefits



***Estate Planning for the Sandwich Generation: How to Help Your Parents and Protect Your Kids***, debuted as the #1 Amazon bestseller in new releases for Wills/Estate Planning. It features 10 estate steps to create an estate plan, *why it is critical to use an estate planning attorney*, and 5 talks to have with your parents about the future. This book addresses frequently asked questions, walks clients through the estate planning process, and affirms the clients' decision to work with an estate planning attorney. Additionally, the book highlights 5 important discussions to have with aging parents regarding finances, medical concerns, aging, end-of-life care, and death. It can be used as a marketing tool for your practice - hand it to prospective clients as an introduction to your estate planning services or give the book as a meaningful thank you to clients for their business. [Learn more](#)



**ARCADIA ART CONSULTANCY**  
ADVISORS & APPRAISERS

[Arcadia Art Consultancy](#) is a full-service, tangible asset management firm that specializes in appraisal reporting, advisory, and collection management services for private collectors of fine art and other luxury assets. Uniquely positioned within the realms of art, finance, and the law, Arcadia Art Consultancy can handle

the most complex matters for high net worth clients. The firm writes thoroughly researched and well-reasoned appraisal reports for such purposes as charitable contributions, equitable distribution, estate tax liability, gift tax liability, imminent sale, insurance coverage, damage and loss claims, and probate and also

provides comprehensive art advisory and collection management services to help private collectors effectively buy, manage, and sell impressive collections of fine art and other valuables. [Learn More](#)



# LeadingResponse

BETTER PROSPECTS. BETTER RESULTS.

[Leading Response](#) is the largest data-driven marketing services company, providing targeted print advertising, social media marketing, and digital advertising

to boost client acquisition for estate planning attorneys. Having marketed close to 600,000 consumer-focused events, the Leading Response seminar event marketing program has generated over 17,500,000 consumer reservations and 800-1,200 campaign mailings per month. The success of the Leading Response social media event marketing is fueled by a second-to-none "look-alike" database of over 112 million consumer contacts. Because of this, clients are assured to get in front of the qualified prospects in their area who need their services. The Leading Response team prides itself of not only having unique industry insight from 25 years of event marketing, but world class consulting and customer service as well. [Learn More](#)



#### COUNCIL BENEFIT

Managing your council's in-person events can be challenging. So much time is wasted by manually tracking continuing education credit, not to mention an attendee's annoyance with lines to access the sign in/out sheets and always remembering to bring their

license numbers! [ConferenceAdit's suite of services](#) offers councils and similar associations an affordable dramatically streamlines attendance tracking, provides customized reporting, generates completion certificates, and immediately capture survey responses, all while improving the attendee experience at your events.

**CE Tracking and Certificates:** Stop wasting time and money on manual reporting! Members apply for CE and receive credit, right on their mobile device.

**Course-Level Surveys:** Dramatically increase attendee feedback by getting instant responses about the session.

**Digital Conference Books:** A significant savings when compared to printing, your council can offer a polished and fully-branded portal with event materials *and* the ability to include sponsors.

As the event host you will have full control over the CE experience. The interactive dashboard allows for easy event set-up, simple management of courses and attendees, and even offers the ability to communicate with attendees via text/email messaging. [Learn More](#)

**[HOT TOPIC]** To learn more about all of the benefits available to your council's members, read on in this newsletter or visit <http://www.naepc.org/membership/benefits!>



**56<sup>th</sup> Annual NAEP Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders**



Join us for NAEPCCs return to Las Vegas!  
November 5 – 8, 2019

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 NAEPCC Advanced Estate Planning conference is known for – good company, great food and exceptional educational content, access to new technology, and tools and firms in the exhibit hall, all with a newly-implemented 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 in April! Mark your calendar today.

**[HOT TOPIC]** *\*Council executives attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.*

#### Robert G. Alexander Webinar Series ·

The Robert G. Alexander Webinar Series provides councils and their members with accessible and affordable multi-disciplinary education. Programs are available live and on-demand and one 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.

#### Next Webinar

**[HOT TOPIC]** Working Well with Widows with Kathleen M. Rehl, Ph.D., CFP®, CeFT®

***Will you be fired or hired by the new widow?*** 70% fire prior advisors after the death of their spouse! Join this intermediate session to enhance your understanding of widowhood... including practical tools, skills, and processes to enhance relationships with these women.

Wednesday, February 13, 2019 · 3:00pm - 4:00pm ET

*Not able to attend on the live date and time? Register anyway and we'll send you a link to the webinar archive so you can view it at your convenience.*

Kathleen M. Rehl, Ph.D., CFP®, CeFT® wrote the multi-award-winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows* and empowers widows financially™ and inspires their advisors through her speaking, writing, mentoring and research about widows and money. Her work has been featured in the *New York Times*, *Wall Street Journal*, *AARP Bulletin*, *CNBC*, *USA Today*, *U.S. News & World Report*, *Journal of Financial Service Professionals*, *Journal of Financial Planning*, and other publications.

[Register for this program](#) or [Register for a series subscription](#)

>See [all upcoming and previous webinars](#)

Registration Fees	Individual	Series
Accredited Estate Planner® Designee	\$40	\$280
Junior / Student (Junior or Student member of an affiliated EPC or one	\$40	\$280

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)		
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 per location)	\$250	\$1,125

Continuing education credit is available at most NAEPC-hosted webinars 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 by your board! Please be sure to mention these valuable services at every council meeting, whether verbally or in print, and within postal 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](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#)
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)
- [Software](#)
- [Subscriptions and Publications](#)
- [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 ·

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](#).

### Staying Connected Via LinkedIn ·

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

**[HOT TOPIC]** NAEPC maintains a group on LinkedIn just for council leaders. Join today to connect with council leaders from across the country and to initiate and participate in council management-specific dialogue! The 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.)



*NAEPC Minute* is an administrative report that does not take the place of *NAEPC News*, the official newsletter of the NAEPC, 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.

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*The Association of Choice for Estate Planning Professionals*