

January 2020 Issue

National Association of Estate Planners & Councils

Monthly Minute

· the monthly administrative newsletter for affiliated local council officers ·

This email is being sent to you as an officer or staff 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.

Scan this message for [HOT TOPICS]!

HIGHLIGHTS

- 2020 Council of Excellence Application
- Speaker Added to Online Library
- Change to Council-Nominated Accredited Estate Planner® Designation Program

BEST IDEAS CORNER

- Creating Compelling Event Announcements

IN EVERY ISSUE

- 57th Annual NAEPC Advanced Estate Planning Strategies Conference
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



2020 Council of Excellence Application

[HOT TOPIC] Download your council's copy of the 2020 Council of Excellence application [today!](#) Applications are due on or before May 15, 2020.

Speaker Added to Online Library

NAEPC is excited to welcome a new speaker to the Online Speaker Library, [Robert Pokorski MD, MBA](#). **[HOT TOPIC]** Dr. Pokorski's topics include longevity, long term care, and incapacity planning. Learn more about this speaker and all of the programming resources available to councils, including the newly-searchable calendar of council events, [on the NAEPC website](#).

Change to Council-Nominated Accredited Estate Planner® Designation Program

There has been an exciting change to the Accredited Estate Planner® (AEP®) Council Nomination Program! Effective January 1st, the minimum experience requirement for council nominees was reduced from 15 to 10 years. This change may open the door for previously unqualified members of your council to be considered for a council nomination, or may be just what your council needs to join the more than 50 councils that participated in the program during last three years. [Learn more on the NAEPC website](#). (*This change does not apply to self-nominating applicants.*)



Best Idea Corner ·

Creating Compelling Event Announcements

Enticing your members to attend an event takes more than simply announcing the speaker's name, topic, program date, and venue. Please consider these important best practices when creating your council's next event announcement.

- Include all of the important details.
 - The date and time of the event
 - The name, designations, bio, and a photo for your speaker
 - A program title and short description of the presentation
 - The event location, including full street address (even if the council has been meeting in the same location for many years)
 - Share the importance of this particular topic or event, including continuing education credit details
 - Sponsor recognition, including thank you text, a logo, and a clickable link to the sponsor's website
 - Member and guest fees, as well as your council's guest policy
 - Instructions for members and guests to register and pay, including the council's cancellation / refund* policies
- Be consistent; begin each message the same way, whether "XYZ EPC 10/05/25 Meeting Announcement" or something similar.
- Allow for ample promotional time prior to the event and follow the council's standard promotional schedule.

Looking for more great ideas? [Review the notes from the Regional Leadership Day events](#) and attend the annual conference or watch the recent tutorial, "[Your Council's Event Calendar: Best Practices and Maximizing its Functionality.](#)"

**required if accepting credit cards for payment*



57th Annual NAEPC Advanced Estate Planning Strategies Conference ·

Join us for NAEPCs return to Fort Lauderdale!

November 3 – 6, 2020

Please consider joining us for the Annual NAEPC Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders. The program offers one day for leaders of estate planning councils (Council Leadership Day, Tuesday, November 3rd) followed by two and one-half days of education for every estate planning professional. **[HOT TOPIC] The Annual Conference educational sessions are open to all estate planning professionals and were built with every member of your EPC in mind.**

Why your members should attend the educational sessions:

- Create a national network of professionals from across the country

- 2 ½ full days of multi-disciplinary education that supplements the council’s yearly calendar of events, offered by the profession’s leading experts
- Up to 17 hours of national and multi-disciplinary continuing education credit
- Competitive registration fee with most meals included

Reasons for your council to send at least one officer & staff executive* to Council Leadership Day:

- Obtain programming ideas
- Gather strategies for membership growth and retention, including how to find/engage younger members
- Learn what similarly sized or located councils are doing on a daily basis during special “learning pods” (topic-based breakout sessions)
- Collect information about how NAEPC can assist the council

Visit www.naepc.org/conference for more information. Registration opens in April; watch the mail for a supply of early bird brochures!

**Council staff executives/administrators 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

Wednesday, Wednesday, February 12, 2020 · 3:00 pm - 4:00 pm ET
Basis Step-Up Strategies in Light of Portability and Tax Law Changes

[REGISTER HERE](#) for this webinar | [REGISTER HERE](#) 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 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 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 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](#).** See the [full list of opportunities](#).

Please remember... all members must utilize a user name/password to access some 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 ·

[HOT TOPIC] All councils are encouraged to update NAEPC every time there is a change to the roster of officers. [Use the new online form today!](#)

Staying Connected Via LinkedIn ·

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

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.

Please reply to this email message if you wish to unsubscribe.

National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114
(866) 226-2224 - fax (216) 696-2582
admin@naepc.org

The Association of Choice for Estate Planning Professionals