

February 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.

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

HIGHLIGHTS

- Council of Excellence Application Available
- Council Nominated Accredited Estate Planner® Designation Program - \$500 Stipend

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?



Council of Excellence Application Available

[The 2019 Council of Excellence application is now available!](#) **[HOT TOPIC]** We consider this application a roadmap of best practices; things that help a council run smoothly and support a great member experience. At the same time, the application is a reciprocal learning experience that gives NAEPC an opportunity to learn more about your council and what is happening within the council network. We look forward to receiving your council's application by the May 15, 2019 deadline and to seeing your council's leadership and members well-represented at the 56th Annual NAEPC Advanced Estate Planning Strategies Conference! Please contact our office with questions.

Council Nominated Accredited Estate Planner® Designation Program

[HOT TOPIC] Estate planning councils affiliated with the National Association of Estate Planners & Councils have the special honor of nominating qualified individuals to apply for the Accredited Estate Planner® (AEP®) designation through the "[AEP® Council Nomination Program.](#)" A council's participation in this program affirms the multi-disciplinary approach to client service and the value that brings all members of NAEPC together, the cultivation of excellence in estate planning. The only graduate level, multi-disciplinary credential in estate planning, the AEP® designation is awarded by NAEPC to professionals who meet special requirements of education, experience, knowledge, and professional reputation. Learn more about the program on our website, including details about a \$500 incentive to hold an AEP® Informational Reception in a format that fits your schedule and vision.



56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders



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 5th) and two and one-half days of education for every estate planning professional (Wednesday, November 6th through Friday, November 8th). **It's not just for council leaders! The Annual Conference is open to all estate planning professionals and was built with every member of your EPC in mind.**

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

- Obtain programming ideas
- Gather ideas 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

Why your members should attend:

- Create a national network of professionals from across the country
- 2 ½ full days of multi-disciplinary education offered by nationally-known presenters that supplements the council's yearly calendar of events
- Up to 17 hours of national and multi-disciplinary continuing education credit
- Competitive registration fee with most meals included

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

[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

Complimentary Sponsored Webinar: Life Settlement Case Studies and How to Protect Client Best Interests with B. Mendelsohn, CEO and Co-Founder of Ashar Group/Ashar SMV
Wednesday, February 27, 2019: live program 3:00pm - 4:00pm ET

There is a general lack of knowledge on the part of policy owners about life settlements that leave them vulnerable to opportunistic institutional investors if they lack proper representation from their advisor/advisory team. This intermediate level program will provide a thorough exploration of life settlement case studies and best practices with the necessary procedures to help mitigate risk and provide unexpected value and protection to clients.

Jon B. Mendelsohn, CEO of Ashar Group/Ashar SMV, is an accomplished presenter and frequent speaker at the Annual NAEPC Advanced Estate Planning Strategies Conference, AICPA ENGAGE, the Association for Advanced Life Underwriting, Advisors in Philanthropy, and other national conferences. Ashar Group is an independent resource that supports financial advisors and fiduciaries by providing life insurance appraisals, life settlements, and longevity services.

[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 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](#).** See the [full list of opportunities](#).

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 ·

[HOT TOPIC] All councils are encouraged to update NAEPC 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?

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