

February 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

- Officer Update Form Now Online
- Council of Excellence Application

BEST IDEAS CORNER

- Integrating Your Council with NAEPC

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?



Officer Update Form Now Online

Regular officer updates are critical to being able to share information with the most important people within your council's current leadership and providing these updates is now easier than ever with a [new online form](#). **[HOT TOPIC]** No more downloading and saving... simply fill out the form, hit send, and your data is on its way to the national office. Update us today and any time there is a change to your council's officers!

Council of Excellence Application

We are very excited to announce the availability of the 2020 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application. This award recognizes councils that are successful in their efforts to provide a strong multi-disciplinary council for their members. > [Download the Application](#)

[HOT TOPIC] NAEPC considers this application a roadmap of best practices; things that help a council run smoothly and support a great member experience, and recommends that all councils review it each year to determine where they might like to make improvements or specific areas on which to focus its board efforts. The award ceremony will take place in Fort Lauderdale on Tuesday, November 3, 2020 at the [NAEPC Annual Advanced Estate Planning Strategies Conference](#) during [Council Leadership Day](#). Please consider this an official invitation to compete and for your council leaders **and members** to attend the annual conference this November.

Please contact our national office if you have any questions about the Council of Excellence Award.
Submissions are requested by Friday, May 15, 2020.



Best Idea Corner ·

Integrating Your Council with NAEPC

Membership in NAEPC offers valuable benefits for both the council and its members and the council must take an active role to ensure that they are fully-utilized. Here are some best practices with regard to creating the connection between your council's members, board of directors, and the national organization.

- Share information about the affiliation with members verbally, in print, and via email and explain that your EPC is a member, highlighting the valuable [benefits](#) and discounts. Incorporate this message as a regular part of the announcements at each membership meeting.
- Enroll members in the "[Every Council Campaign](#)" and supply a member roster to NAEPC. Without this participation, your council's members won't get the piece of the puzzle that makes the connection from NAEPC to your council.
- Empower the council's staff executive to become a leader in the Council / NAEPC relationship.
- Create a "Liaison" position on the council's board and charge this person with presenting updates from the national office - information on initiatives, sharing NAEPC requests, etc. These reports should be brief, but add tremendous value. (Don't forget to [let NAEPC know](#) who you have assigned to this position!)
- Plan and budget to send at least one council officer and the staff executive to the Annual Conference to participate in [Council Leadership Day](#) and to a [Regional Leadership Day](#) conference every year. These events are the best place to hear what other councils are doing, how they are doing it, and to get ideas for membership growth and retention, new programs, and exciting initiatives.

Looking for more great ideas? [Review the notes from the Regional Leadership Day events.](#)



57th Annual NAEPC Advanced Estate Planning Strategies Conference ·

The Countdown to Ft. Lauderdale Begins...

November 3 – 6, 2020

Our signature annual event offers one day for leaders of estate planning councils (Council Leadership Day, Tuesday, November 3rd) and two and one-half days additional days of education for every estate planning professional.

IT'S NOT JUST FOR COUNCIL LEADERS!

[HOT TOPIC] 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 and its 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 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 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, March 11, 2020 · 3:00 pm - 4:00 pm ET

Charitable Giving and Tax Planning Strategies in the TCJA Era with Patrick J. Saccogna, JD, LL.M. (taxation), CPA*, AEP® [*inactive CPA status]

The tax act formerly known as the Tax Cuts and Jobs Act (TCJA) fundamentally altered the charitable giving and tax planning landscape for all donors. In this program, the presenter will summarize the major tax law provisions that impact charitable giving and donors, and identify and discuss key charitable giving and tax planning opportunities and strategies available to donors today.

[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.

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The Association of Choice for Estate Planning Professionals

