

March 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.

HIGHLIGHTS

- 2018 Council of Excellence Award Application Available
- Regional Leadership Day Events – June 2018 in California & Washington
- Leimberg Information Services (LISI) Council Subscription
- New & Updated Member Benefits

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
- Council Leadership Group on LinkedIn

Scan this message for [HOT TOPICS]!

2018 Council of Excellence Award Application

We are very excited to announce the release of the 2018 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application, an award created to recognize councils that are successful in their efforts to provide a strong multi-disciplinary council for their members. The award ceremony will take place in Ft. Lauderdale on Tuesday, November 6, 2018 at the NAEPC Annual Advanced Estate Planning Strategies Conference during Council Leadership Day. Please consider this an official invitation to compete and to attend the annual conference this November. Submissions are requested by Friday, May 25, 2018 so don't delay! We are anxious to receive your application. **[HOT TOPIC]** > [Download the application](#)

Regional Leadership Day Events

Planning for the 2018 Regional Leadership Day programs is in full swing and NAEPC invites your council's leadership to join us on Tuesday, June 19th in Anaheim, CA, Thursday, June 21st in San Francisco, CA or Monday, June 25th in Seattle/Tacoma. All councils within a reasonable distance of these cities are encouraged to send multiple board members and those from outside of the immediate area are also welcome to attend; a block of rooms is available for those in need of overnight accommodations.

Registration is now open! > [Learn more about Regional Leadership Day](#) or > [Read the notes from the 2017 Regional Leadership Day and Council Leadership Day conferences](#)

Leimberg Information Services (LISI) Council Subscription

Through a very special arrangement with Steve Leimberg, estate planning councils affiliated with NAEPC have an opportunity to provide their members with the Leimberg LISI Service at a greatly reduced fee*. **[HOT TOPIC]** Members of enrolled councils will have unlimited access to Leimberg Information Services' huge database of cases, rulings, legislation, etc. After enrollment, estate planning council members will receive weekly email reminders from NAEPC that the Leimberg Information Service website is available through membership in your estate planning council. Councils also have access to a member tutorial, brochures, and guidance with regard to best practices with regard to promoting the availability of this valuable member benefit. This valuable benefit is available at a cost of \$24/member/year to councils that enroll by April 30th. > [Learn more](#)

**This service is available to an estate planning council only. All members of the EPC must be enrolled. Individual subscriptions are not available at this time.*

New & Updated Member Benefits

Each month we talk about member benefits within this newsletter – a valuable list of opportunities available to your members, for which your board must do no additional work to provide (other than making sure members know these benefits are available, of course!). This month we're excited to highlight new or updated benefits!

Attendee Discounts

- [AICPA ENGAGE](#) - June 9-14, 2018, Las Vegas
- [American Law Institute Continuing Legal Education Estate Planning in Depth 2018](#) - June 24 – 28, 2018
- [American Law Institute Continuing Legal Education Planning Techniques for Large Estates 2018](#) - April 25 - 27, 2018
- [American Law Institute Continuing Legal Education Representing Estate and Trust Beneficiaries and Fiduciaries 2018](#) – July 19 - 20, 2018

Other Benefits

- [LINK: Advanced Online Training in Collaboration](#)
- [Ruby Receptionists](#), Virtual Receptionist Services



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

The [55th 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. The program will provide two and one-half days of continuing education credit for the various estate planning disciplines and create an opportunity for your members to develop valuable relationships with professionals from across the country, along with an [entire day of activities just for your council's board of directors](#). **Speakers will be announced soon and registration opens in April!**

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](#)

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, 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?

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.)

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The Association of Choice for Estate Planning Professionals