

March / April 2020

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

- Your Council and COVID-19, Update #2
- Council of Excellence Applications Due on May 15, 2020
- New Speaker Added to Online Library

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?



Your Council and COVID-19, Update #2

NAEPC continues to monitor details about the coronavirus disease 2019 (COVID-19). Much like your estate planning council, the NAEPC board of directors, in cooperation with our staff team, is following guidance from the Centers for Disease Control, World Health Organization, U.S. State Department, and other organizations with regard to managing events. You can read the NAEPC response to COVID-19 and updates [on our website](#).

There is no doubt that your council is feeling the strain of making decisions in the midst of ever-changing information and that your board of directors is currently trying to decide upon appropriate next steps. We are encouraging councils to be flexible, to consider meeting during the summer months, and to think about adding programs next year to replace those that were cancelled.

NAEPC is here to help! We have:

- A national office that wants to talk with you about your council's specific circumstances and has the benefit of knowing what other councils are doing with regard to event cancellations and rescheduling, dues adjustments, and how to keep members connected with one another during this time
- Sample event cancellation language

- Recommendations for virtual programming solutions that take into consideration your council's specific needs like CE tracking and reporting and payment collection
- The Robert G. Alexander Webinar Series, a program that offers most councils one complimentary group gathering each fiscal year
- A team standing by to discuss event agreements and their proposed cancellation and performance penalties

Contact our national office at 866-226-2224 or eleanor@naepc.org at any time.

Council of Excellence Applications Due on May 15, 2020

The Council of Excellence application period is open for another six weeks. This program honors those councils that provide exceptional member service and NAEPC also considers it to be a roadmap of best practices; things that help a council run smoothly and support a great member experience. > [Download the Council of Excellence Application](#)

Don't delay - **Submissions are requested by Friday, May 15, 2020!** Although the deadline has not been extended, NAEPC will accept requests for a 2-week extension via email to eleanor@naepc.org.

Pierre DuPont Joins Online Speaker Library

In March we welcomed Pierre DuPont to the Online Speaker Library. His most popular presentations are: "Wealth and the Razure of Oblivion"; "Family Cohesion Across Generations"; "Entrepreneurship, Business Growth, and Wealth Preservation"; "Technology Innovation for Global Growth"; "Passing the Torch"; "Raising Children into Wealth"; and "Legacy Planning and the Future of the Family." Learn more about [Mr. DuPont](#) and all of NAEPC's programming resources for councils [on our website](#).



57th Annual NAEPC Advanced Estate Planning Strategies Conference • November 3 – 6, 2020

Schedule, Speakers & Topics Announced Soon!

A CONFERENCE BUILT FOR MORE THAN JUST COUNCIL LEADERS

The Annual Conference is open to all estate planning professionals and is created with every member of your EPC in mind. Your members will:

- Create a national network of estate planning professionals
- Attend 2 ½ full days of multi-disciplinary education offered by nationally-known presenters that supplements the council's yearly calendar of events
- Receive up to 17 hours of national and multi-disciplinary continuing education credit
- Enjoy the benefit of a competitive registration fee with most meals included

[HOT TOPIC] Reasons for your council to send at least one officer and its staff executive* to Council Leadership Day / Pre-Conference Sessions for Estate Planning Council Leaders, November 3, 2020:

- 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

Visit www.naepc.org/conference for more information. Registration is scheduled to open in early May.

[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, April 8, 2020 3:00 pm - 4:00 pm ET

The Ethical Considerations of NY State DFS Reg 187, FINRA Rule IM2210 and the UPIA Relating to "Decision Support Material" Used in the Life Insurance Decision Process: A Program for All Fiduciary Professionals with Steven S. Zeiger, CEBS, TEP

[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