

March 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

- Your Council and COVID-19

### IN EVERY ISSUE

- 57<sup>th</sup> 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

NAEPC is carefully monitoring the details about the coronavirus disease 2019 (COVID-19). The board of directors, in cooperation with our staff team, is following appropriate state and national guidance about managing business events, which includes information from the Centers for Disease Control (CDC), World Health Organization (WHO), U.S. State Department, etc. You can read the NAEPC response to COVID-19 and updates [on our website](#).

We encourage each board of directors to meet via conference call to discuss the best course of action for your council and its upcoming events, taking into consideration specific details surrounding your community or region. As these meetings take place, we recommend addressing not only the prevalence of the virus within the community and restrictions that employers may be placing upon their team members, but most importantly, guidance from organizations like the CDC and WHO. Here are a few additional recommendations that may be helpful:

- Initiate immediate proactive communication with the membership, even if it is to say that the board has this matter “top of mind” and is monitoring guidance from the CDC and other organizations.
- Post a message on your association’s website that speaks to the board’s commitment to monitoring the situation and offers an update of the current plan with regard to council operations and hosting events.
- Adopt flexible guidelines about how event cancellations/refunds will be handled for this specific issue. This policy is likely to differ from your existing policy due to the special circumstance.
- Consider hosting board and committee meetings that would otherwise be in-person via conference call.

- Keep in regular contact with the council's staff member and its membership as a whole.
- Review existing contracts and cancellation penalties, speak to venues about flexibility with regard to rescheduling when doing so is possible, and be flexible with regard to rebooking.

NAEPC is available to help with sample language or statements, recommendations for virtual programming solutions, or to have a conversation about cancellation or performance penalties for event agreements. Contact our national office at 866-226-2224 or [eleanor@naepc.org](mailto:eleanor@naepc.org) at any time.



### 57<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference ·

The Countdown to Ft. Lauderdale Continues...  
November 3 – 6, 2020

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

#### **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. **[HOT TOPIC]** 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

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

Visit [www.naepc.org/conference](http://www.naepc.org/conference) for more information. Registration is scheduled to open during 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, 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.

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*The Association of Choice for Estate Planning Professionals*