

April 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 Applications due May 15<sup>th</sup>
- Regional Council Leadership Day: Register by June 11<sup>th</sup>
- Annual NAEPC Advanced Estate Planning Strategies Conference Speakers Announced, Registration Now Open

### IN EVERY ISSUE

- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



### Council of Excellence Applications Due May 15<sup>th</sup>

2019 Council of Excellence applications are due in approximately 2 weeks! Download the information and application packet at <http://www.naepc.org/affiliated-councils/council-of-excellence-award>. **[HOT TOPIC]**  
Hurry – applications are due on or before May 15<sup>th</sup>!

### Regional Leadership Day

Regional Council Leadership Day is an interactive learning and sharing experience for volunteer leaders and executives from estate planning councils within the same geographic region. The **complimentary** day of programming offers a “hot topic” session, networking luncheon, and a roundtable session and each council is encouraged to send multiple officers and the council executive. While most attendees will be from the area nearest the conference, regional programs are open to all estate planning councils and participation from those outside of the immediate area is welcome and encouraged.

**[HOT TOPIC]** 2019 Schedule:

Atlanta, GA · Tuesday, June 18, 2019

Renaissance Atlanta Waverly Hotel & Convention Center

[REGISTER ONLINE FOR ATLANTA](#)

Bergen County, NJ (Saddle Brook, NJ) · Wednesday, June 19, 2019

Saddle Brook Marriott

[REGISTER ONLINE FOR NEW JERSEY](#)

Denver, CO (Thornton, CO) · Monday, June 24, 2019

DoubleTree by Hilton Denver - Thornton

[REGISTER ONLINE FOR DENVER](#)

Learn more about the event created to enhance member service through successful initiatives learned from other councils at [www.naepc.org/content/Regional%20Leadership%20Day](http://www.naepc.org/content/Regional%20Leadership%20Day). Registration is requested by June 11<sup>th</sup>.

### 56<sup>th</sup> Annual NAEP Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders



The [56<sup>th</sup> Annual NAEP Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 5 - 8, 2019 in Las Vegas!

**Now is the time to register your council's leadership attendees and to start sharing details about the conference with the members of your council.**

- ✓ Speakers and topics have been announced
- ✓ Early registration is open for both the conference and the swanky host hotel, The Cosmopolitan of Las Vegas
- ✓ Single-day passes are now available
- ✓ More social / networking time has been incorporated into the schedule

#### **Reasons for your council to send an officer or officers & the council's executive\* to Council Leadership Day/the Pre-Conference Sessions for Council Leaders:**

- Learn from other council leaders during topic-based sessions called learning pods
- Acquire new programming ideas, solutions for membership growth, and concepts for new initiatives
- Expand your perspective on how similarly-sized councils are operating on a daily basis
- Gather information about how NAEP can assist the council

#### **[HOT TOPIC] Reasons for your council's members to attend:**

- An opportunity to grow their national network of estate planning professionals and learn alongside like-minded individuals
- Competitive registration fee with most meals included and a reduced rate for your council's members
- Two and one-half days of multi-disciplinary education offered by nationally-known presenters that complement a council's yearly calendar of events
- Up to 17 hours of continuing education credit

*\*Council executives attend the Tuesday and Wednesday morning sessions with the registration fee waived and participate in special executive-only events and meetings. Contact the national office to learn more.*



#### **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, May 8, 2019: 3:00pm - 4:00pm ET

### The Generational Solution with Leonard Renier

The idea of viewing the family as a single unit has been ignored by almost everyone; yet, it remains as one of the only solutions for creating lasting family wealth generationally. The government has created a generational problem; it is time to have a discussion about a generational solution. Interference from the government and an enormous lack of financial knowledge rob families from passing tremendous amounts of wealth to the next generation. Along with it goes the lasting family legacy. Today, in generating family wealth, dabbling in stocks and mutual funds doesn't provide the ownership and control that is needed to pass on wealth successfully. The elements that affect these types of legacies are taxes, risk, creditors, and luck.

Over the past twenty years Leonard Renier has studied the economic trends and shifts and the impact of government programs and regulations on the social fabric of our country. His research has resulted in bringing a new awareness to the financial challenges the average American faces. Leonard is considered an expert in communicating these challenges and believes with more information; people will make better life decisions. His thought provoking discussions are intended to challenge traditional thinking and to redefine the planning approach. Over the past several years he has trained thousands of financial professionals. His software, research and personal communication training delivers the discussions and information needed to make better decisions in today's economy. Wealth & Wisdom Institute is the bridge between understanding the challenge and achieving financial goals.

[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 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.

Please reply to this email message if you wish to unsubscribe.

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*The Association of Choice for Estate Planning Professionals*