

National Volunteer Week Issue • April 2021

National Association of Estate Planners & Councils Monthly Minute

· the administrative newsletter for affiliated local council leaders ·

This email is being sent to you as an officer, director or staff executive for your NAEPC-affiliated local estate planning council; all board members on file with NAEPC receive the email.
In a hurry? Scan this email for **[HOT TOPICS]**!

HIGHLIGHTS

- Council of Excellence Application
- Changes to Every Council Campaign
- “Pick Four” Webinar Package
- New Speakers Added to Online Library

BEST IDEA CORNER: The Show Will Go On

IN EVERY ISSUE

- Diversity, Equity and Inclusion
- NAEPC Advanced Estate Planning Strategies Conference
- Upcoming Webinar
- Benefits Available to Members of Your Council – **NEW BENEFITS**
- Board Update Form
- Join the Council Leader Group on LinkedIn



Council of Excellence Application

The 2021 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application is available and now requested back on or before Friday, May 28, 2021 to accommodate the updated tax deadline. The award recognizes councils that are successful in their efforts to provide a strong multi-disciplinary council and honors those that offer an exceptional member experience. > [Download the Application](#)

Changes to Every Council Campaign

[HOT TOPIC] The "Every Council Campaign" is an initiative that allows NAEPC to complete the chain of communication that connects your council's members and leadership to the national association. The program is a direct result of feedback that councils want their membership to be more connected with NAEPC; currently 75% of the affiliated councils are participating. New for 2021! Participating councils have an opportunity to enroll their members to receive notification when new issues of the [NAEPC Journal of Estate & Tax Planning](#) have been released! Learn more about this program and access the enrollment / change form [on our website](#).

“Pick Four” Webinar Package

[HOT TOPIC] NAEPC understands that councils want compelling virtual programming options to supplement their regular calendar of events, especially today. To accommodate this need, NAEPC is offering affiliated councils on-demand* access to any four webinars presented during the 2021 calendar year for a reduced cost

of \$400. Your council can choose from any webinar that has or will be hosted during this calendar year. To learn more, [visit our website](#).

**NAEPC will provide a website link and a password to the recorded version of the webinar, which can be used to show the program to council members and guests who have gathered together on a virtual meeting. Please allow up to three business days after the live webinar to receive the link to the recorded program.*

Speaker Added to Online Library

NAEPC is excited to welcome two new speakers to the [Online Speaker Library](#), Evan M. Levine ChFC® & Nainesh Shah, MBA, CFA. These two individuals [present on the topics of](#): valuation issues in estate planning; valuation tax cases and planning opportunities; family business succession planning for valuations; exit planning for valuations; buy-sell agreements for valuations; and working with other professionals



BEST IDEA CORNER: The Show Will Go On

When is the best time to start planning for remainder of the calendar year and early next year? **Now!** It may not be time to get back together in person, but it's definitely time to start planning for when you can. Here are several helpful hints for a smooth return to normalcy:

- Make sure you're hosting virtual events now so your members still feel connected to your council and other members. These events should be exciting, creative, and are often well received when hosted outside of the council's normal meeting dates and times.
- Understand that some of your members may not be ready to return to in-person events, even if your state allows it and your board of directors feels it is the right time. Consider hybrid events with part of the audience in-person and the remainder watching from their home or office.
- Solicit member feedback and offer updates on the council's plans early and often.
- Make sure you have a plan for things like waivers and mask enforcement, if necessary.
- Execute venue contracts and vendor agreements carefully and with flexibility.



Diversity, Equity and Inclusion •

NAEPC was approached last year by one of the association's affiliated local councils inquiring whether a sample statement with regard to racial injustice / inequality was available for council use. Although it did not exist at that time, the Executive Committee was in agreement that having such statement is important. Additionally, strong support in favor of enhanced initiatives related to diversity, equity, and inclusion were also heard. As a result, what is now the NAEPC Diversity, Equity and Inclusion Committee was formed. **[HOT TOPIC]** Our mission is simple: to create momentum and to cultivate a foundation for growth in the number and type of diverse voices within the association's leadership, membership, and programming, as well as that of the councils affiliated with NAEPC, the profession as a whole, and various disciplines represented within. See resources and learn more about the committee and its work [on our website](#).

If your council has successful DEI initiatives in place, [please let us know](#). We will be publishing the work of NAEPCs affiliated local councils on the DEI page of the national website. We are also excited to highlight those who speak on DEI and related topics so if your council has a suggestion, [please send it along](#).

58th Annual NAEPC Advanced Estate Planning Strategies Conference ·

The NAEPC board of directors has been monitoring the evolving situation with COVID-19 closely since early 2020. It is with sadness and out of an abundance caution that we announce the cancellation of the in-person 58th Annual NAEPC Advanced Estate Planning Strategies Conference scheduled from November 2-5, 2021 in Las Vegas, Nevada. At this time it is clear that we simply cannot provide an in-person attendee experience that will be completely safe, comfortable, or that will accomplish the multitude of goals associated with hosting our signature annual event. You can expect to receive the formal notification of this change via email soon.

[HOT TOPIC] The conference committee is hard at work planning our second virtual experience, which will take place from November 2 – 4, 2021 from approximately 11:00 am ET – 6:00 pm ET each day. We envision an enhanced experience from that of last year coupled with a longer conference, more access to sponsors and exhibitors, and more presenters that you know and enjoy listening to speaking on topics important to the various disciplines within the profession. Registration will allow you to come and go as you please and to attend the sessions that are most meaningful to you and your practice and to visit with the sponsors and exhibitors that make it possible for us to offer this event for such a low registration fee. While we know this news is disappointing, we hope you and your council's members will plan on being with us virtually in November. You can expect to hear more from us in the days ahead and can always find the most recent information [on our website](#).

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. > [See all upcoming and previous webinars](#)

Next Webinar

529 Planning

Susan T. Bart, JD

Live Wednesday, May 12, 2021 from 3:00pm - 4:00pm ET

[Learn More and Register](#) or [Register for the Series](#)

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
Group Gathering – Council “Pick Four” Program		\$400

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 regularly, whether verbally or in print, and within postal mailings. > See the [full list of opportunities](#).

[HOT TOPIC] *New Benefits*

All Language Alliance, Inc.

All Language Alliance, Inc. is a legal translation agency you can trust to provide certified translation services, official document translation services, Apostille translations, medical translation services, legal document translation services, in-person deposition interpreting services, remote Over the Phone and video deposition interpretation services via Zoom, technical translation services, and court certified translation services into more than 100 languages. [Learn More](#)

Purposeful Planning Institute 2021 RendeZoom - July 22 - 23, 2021

NAEPC members are eligible to take advantage of a 15% discount to attend Purposeful Planning Institute's 2021 RendeZoom. RendeZoom will bring together individuals representing more than 20 disciplines and professions for three days of collaborative dialogue, keynotes, and breakout sessions centered on best practices for legacy families and families in business. RendeZoom offers unique opportunities to connect and engage with thought leaders and industry innovators, while exploring cutting-edge topics on family dynamics, governance, collaboration, philanthropy, and more. [Learn More](#)

FinancialAdvisors.com

The FinancialAdvisors.com platform for Independent investment advisors and tax/accounting professionals provides the most comprehensive profile in the financial advisory industry. With over 50 data points, the Premium profile will add value to your marketing plans. Individuals seeking financial guidance will find the FinancialAdvisors.com marketing platform highly informative and easy to navigate, ensuring a pleasant experience that facilitates the lead generation process. [Learn More](#)

Board Update Form ·

All councils are encouraged to update NAEPC every time there is a change to the roster of board members. [Send us your update using the 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 and/or join our [General Group](#) or the private [Accredited Estate Planner® Group](#) (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