

May 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

- Regional Council Leadership Day: Register by June 11th
- Council Officers Changing Soon? Update NAEPC
- New Speaker Available

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



Regional Council Leadership Day

[HOT TOPIC] Regional Council Leadership Day is a complimentary event **just for councils and their leaders**, offering an interactive learning and sharing experience for estate planning councils within the same geographic region. The day of programming offers a “hot topic” session, networking luncheon, and a roundtable discussion 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.

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](#)

Registration is requested by June 11th. > [Learn more](#)

Council Officers Changing Soon? Update NAEPC -

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](#).

New Speaker Available in Online Speaker Library

NAEPC offers all affiliated councils several programming resources. The "No-Charge" Speaker Program, Robert G. Alexander Webinar Series, and Online Speaker Library provide high-quality speakers on various topics related to estate planning. Councils can also choose to seek input from other councils at the Regional and Council Leadership Day events, as well as within the LinkedIn group just for leaders. **[HOT TOPIC]** This month we are pleased to announce the addition of a new speaker to the Online Speaker Library:

[Elizabeth T. Russell, Atty - Middleton, WI](#)

Topics: Topics: intellectual property consideration in estate planning (in particular, the copyright termination policy); revocable trusts, lifetime irrevocable trusts, termination right planning (in the context of lifetime transfers to trust); planning issues and the effect of lifetime transfers of copyright; trademark issues. Speeches: "Do This, Not That" (music law); "Copyright is Cool (and so are you)"; "The Law: in 45 Minutes"; "Intellectual Property Considerations for Estate Planners"; "They Always Fire the Drummer"; "How Not to get Sued for Playing Music in Public"

>[Learn more about all of the programming resources available to councils](#)



56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders



The [56th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 5 - 8, 2019 in Las Vegas! [Speakers have been announced and registration is open – register soon for the early rate!](#)

It's never too early to plan to attend and to start sharing details about the conference with the members of your council. **[HOT TOPIC]** The program offers two and one-half days of continuing education credit for the various estate planning disciplines and creates an opportunity for your members to develop valuable relationships with professionals from across the country.

In addition to promoting the conference to the members of your council, we hope your council will send multiple executive committee members and your council's executive* to Council Leadership Day on Tuesday, November 5th. This day of events provides plenty of time to meet with and learn from other councils, as well as the leadership of NAEPC. > [Learn more about Council Leadership Day](#)

The contact on record for your council will soon receive a supply of early bird conference brochures. Please share this information with your board and encourage your members to attend through email and in person at meetings and events.

**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

Leaving a Lasting Legacy with Eric Weiner, PhD

Rather than simply transferring an inheritance to heirs, some people have a vision of the future to share for generations to come. Advisors play a key role in helping clients deepen a family's values, philanthropic commitments, and to help keep the family connected. Learn to leave a legacy that matters.

Dr. Weiner helps families have values-based conversations about money and inheritance as part of their tax and legal estate planning strategies. His passion is to help families define a legacy that preserves both physical assets and family relationships over time. His award-winning book "Words from the HEART: A Practical Guide to Writing an Ethical Will," is a tool that assists families in defining what matters most in the inheritance preparation process.

[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