

May 2020 Special 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]!

- Your Council and COVID-19, Update #3
- Council of Excellence Applications Due on May 15, 2020
- May 29, 2020 Website Tutorial: Leveraging your NAEPC-hosted Website to Maximize Your Council's Sponsorship Income
- Upcoming Webinars

#### **Your Council and COVID-19, Update #3**

Your council is not alone in feeling the pressure of making important decisions in light of COVID-19. Whether those concerns are related to keeping members engaged, replacing valuable educational programming, or preparing for the upcoming fiscal year, NAEPC is here to help.

If you have not already done so, please take a moment to read the [letter from President Garniewski](#) in the most recent issue of *NAEPC News*. Jack offers an update on the efforts of the national board of directors with regard to council and member assistance, including special complimentary access to a webinar addressing remote work, the association's commitment to endorse the efforts of each state and other jurisdictions to enact legislation permitting, on a permanent basis, remote notarization and remote apostille designations on all estate planning documents, and the creation of a new task force to develop resources for councils and members that speak to planning post-crisis.

NAEPC has also planned "Town Hall Roundtable" sessions for council leaders and staff executives. These hour-long informal Zoom events will allow councils to share COVID-19 related successes while also addressing the most common questions being received by our Council Relations Committee representatives and staff team with regard to member engagement, dues structure, etc. Attendance is limited on each call and while the first programs sold out quickly, a new date has been added and we'll continue to add dates as interest dictates.

Register [HERE](#) for May 22, 2020 at 1:00 pm ET

A committee is also in place to address changing the [Regional Leadership Day](#) programs typically held in June from an in-person event to a virtual event. We will share more on this change as details are available.

Please contact our national office at 866-226-2224 or [eleanor@naepc.org](mailto:eleanor@naepc.org) at any time; we are happy to discuss operations issues and are always available to join on a board call to discuss these challenges or the benefits of affiliation. You may also read the NAEPC response to COVID-19 [on our website](#).

#### **Council of Excellence Applications Due on May 15, 2020**

The Council of Excellence application period is nearing its close. 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 on or before May 15<sup>th</sup> for a 2-week extension via email to [eleanor@naepc.org](mailto:eleanor@naepc.org).

### **May 29, 2020 Website Tutorial:**

#### **Leveraging your NAEPC-hosted Website to Maximize Your Council's Sponsorship Income**

Join us at 2:00 pm ET or register for on-demand access.

Your council's NAEPC-hosted website offers sponsors a significant opportunity for exposure. You have control over the type of sponsorships you offer, logo placement, and the length of time a sponsor appears on the site. Attend this tutorial to gather an understanding of these options or to simply learn more about offering sponsorship opportunities for your council. [REGISTER HERE](#)

### **Upcoming Webinars**

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.

**Looking to replace your council's late-season programming? Contact NAEPC and let us help!**

Wednesday, May 13, 2020 - 3:00pm - 4:00pm ET

#### **Collaboration Matters: Working Together to Produce Extraordinary Results with NAEPC Estate Planning Hall of Fame® Member Albert E. Gibbons, CLU®, ChFC®, AEP® (Distinguished)**

When professionals operate in silos, the quality of advice and planning is subpar. As tax laws remain uncertain, planning has become more complicated, solutions more complex, and as the marketplace grows more advanced, the call for a SuperAdvisor (team of experts) for the SuperClient seems essential and irreversible. A team of experts provides checks and balances due to the overlapping knowledge of the participants, accepts 100% responsibility for the well-being of the client, and tenaciously makes sure there is flawless implementation of their recommendations. Attend this all-level presentation to gather an understanding of how best to work in a team environment and to learn strategies to take these tips back to your own practice. [LEARN MORE & REGISTER HERE](#)

Wednesday, May 20, 2020 - 3:00pm - 4:00pm ET

#### **SPECIAL ADDITION! Remote Signing, Witnessing, and Notarization of Estate Planning Documents: Is the Future Here? with Timothy S. Reiniger, Esq.**

Remote signings and notarizations are growing in popularity, especially as a result of COVID-19, but confusion still exists amongst estate/probate practitioners. What is an online/remote notarization and witnessing? How is it performed? Is it legally authorized in my state for use with estate planning documents? Tim Reiniger, Esq, Director of Reiniger LLC, the principal author of the Virginia online notarization law as well as the Virginia Digital Identity Law, will answer these questions and more during this all-level webinar created just for NAEPC council and members in light of the current crisis in the country. In addition learning answers to the most popular questions surrounding remote signing and notarizations, attendees will gain a better understanding of how to prepare an office for

performing eNotarizations and online/remote notarization compliantly. [LEARN MORE & REGISTER HERE](#)

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

<b>Registration Fees</b>	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.

*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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