

June/July 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 Wrap Up
- New Member Benefit
- New Speakers Available

IN EVERY ISSUE

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



Regional Council Leadership Day Wrap Up - Lawrence J. Macklin, Esq., CPA, AEP®, Event Chair



NAEPC recently finished its 2019 three-city tour to educate estate planning council leaders. These one-day [Regional Leadership Day](#) events were held in Atlanta, Northern New Jersey, and Denver in June. During the three days, 56 estate planning council leaders from 35 different councils heard about the benefits offered by NAEPC and available to both their councils and their members, including the [NAEPC Advanced Estate Planning Strategies Conference \(with the Pre-Conference Sessions for Council Leaders\)](#), the [Accredited Estate Planner® \(AEP®\) designation](#), and so much more. But the best part of the day was the council sharing sessions when council leaders heard best practices from each other on how to improve their own councils. **[HOT TOPIC]** Notes from these sessions are available [HERE](#).

All council leaders left these events energized and excited to bring these new ideas back to their councils. NAEPC has now completed three years of Regional Leadership Day events in nine locations attended by almost 200 council leaders from 84 different estate planning councils. In the future, look for a NAEPC Regional Leadership Day event coming to a city near you!

New Member Benefit

Journal of Financial Service Professionals, the Official Publication of the Society of FSP

The Journal of Financial Service Professionals, considered by many the most valuable benefit of membership in FSP, is now available to members of NAEPC at a special discounted price.

Each issue of the Journal delivers impactful information and results-oriented content you can apply in your practice immediately, including a column dedicated exclusively to estate planning topics. Contributors to the Journal are thought leaders and experts from the entire spectrum of financial services, reflecting the nature of your practice—which requires a collaborative, multidisciplinary approach to deliver the highest level of client service possible. Enjoy the Journal’s superior content in your choice of format; your subscription includes the print edition, online version, and digital edition which is designed to be read from your smartphone or tablet.

Subscribers to the Journal receive tremendous value: six issues per year, a study/discussion guide for each one, free access to programs based on Journal content, and access to archived issues going back to 2007. As a NAEPC member you get all those benefits at a 20% discount—just \$104/year. Learn more about this benefit [HERE](#).

To learn about all of the benefits available to your council’s members, click [HERE](#).

New Speakers 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:

[Harvey A. Hutchinson, III MBA, M. Acc., JD, LL.M. \(taxation\), CFP®, AEP®](#)

Topics: federal income taxes; federal transfer taxes; general estate planning; current update on recent estate planning changes; trends in estate planning; financial decision making in an estate plan; planning for retirement plans; IRAs and other employee benefits; asset protection planning; the psychology of planning; partnerships, LLCs and entity planning; planning for divorce and/or second marriage; testamentary trusts; revocable trusts; lifetime irrevocable trusts; life insurance trusts; defective trusts; dynasty trusts; S Corporation trusts; charitable trusts; incentive trusts; avoiding common mistakes in trusts; choosing fiduciaries; using charitable trusts; planning for charitable transfers; private foundations, donor advised funds, supporting organizations, endowments; life insurance charitable planning; long term care; incapacity planning; family business succession planning; exit planning; buy-sell agreements; working with other professionals; "High-Net-Worth Client Planning"; "The Financial Planning Perspective in Estate Planning"; "Forensic and Investigative Accounting"; Living Trusts; Uses and Abuses"; "IRAs and Other Savings Tools"; "Estate Planning and Drafting Fundamentals"; "Fundamentals of Will Drafting"

[Lee Poskanzer](#)

Topic: "Digital Asset and Property in the Afterlife: Effective and Lawful Planning and Administration"

>[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!](#)

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 NAEPC 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

Learn more and register at www.NAEPC.org/conference.

**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.*

Best Idea Corner · Three ways to Reach Younger Professionals

1. Create relationships with local professors, perhaps offering them complimentary membership, and encourage these individuals to participate in council events and share information about the council with their students
2. Ask and encourage members to bring NextGen guests to council events
3. Consider the implementation of a mentorship program

Learn additional best ideas by [reviewing the notes](#) from the recently-concluded Regional Leadership Day programs!

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, August 14, 2019: 3:00pm - 4:00pm ET

Technology in Your Estate Planning Practice with Martin M. Shenkman, CPA, MBA, JD, PFS, AEP® (Distinguished)

This program will explore a wide range of practical considerations of how practitioners can use technology to better serve clients, protect themselves from malpractice claims, market, be more cost efficient, and much more. Specific practical practice examples will be given, not merely theoretical discussions.

Martin M. Shenkman, CPA, MBA, JD, PFS, AEP® (Distinguished) is an attorney and estate planner in Fort Lee, NJ and New York City. His practice concentrates on planning for high net worth individuals. He is the author of 43 books and more than 1,200 articles and is a member of the NAEPC Board of Directors.

[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