

July 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

- A Look Inside NAEPC
- Upcoming Events for Council Leaders
- “Pick Four” Webinar Package

**BEST IDEA CORNER:** [Planning for a New Season](#)

## IN EVERY ISSUE

- NAEPC Advanced Estate Planning Strategies Conference
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Board Update Form
- Join the Council Leader Group on LinkedIn



## A Look Inside NAEPC

Help your board of directors and membership learn more about NAEPC and our service to councils and their members by [downloading or sharing our newest resource PowerPoint, “A Look Inside NAEPC.”](#) This 14 page, easy-to-follow document offers a brief overview of the association and its service to Estate Planning Councils.

## Upcoming Events for Council Leaders

**This Week! Town Hall Roundtable:** Our Council was Dormant during COVID: How do we Regroup?  
Tuesday, July 27, 2021 from 1:00 pm ET - 2:00 pm ET

If your Estate Planning Council has been dormant or less active since the onset of COVID-19, this is the event for you. During our hour together we'll dive into simple and easy steps to get your council back up and running along with best practices with regard to hosting events in the near future. [Register Here](#)

**Town Hall Roundtable:** Council by Size Session for Extra-Small & Small Councils (1-100 members)\*

Tuesday, August 03, 2021 from 1:00 pm ET - 2:00 pm ET

[Register Here](#)

**Town Hall Roundtable:** Council by Size Session for Medium Councils (101-250 members)\*

Tuesday, August 10, 2021 from 12:00 pm ET - 1:00 pm ET

[Register Here](#)

**Town Hall Roundtable:** Council by Size Session for Large & Extra-Large Councils (251+ members)\*  
Tuesday, August 17, 2021 from 1:00 pm ET - 2:00 pm ET  
[Register Here](#)

**Council Executive / Administrator Development & Website Feedback Session (Private)**

Thursday, September 9, 2021 from 3:00 pm ET - 5:00 pm ET  
Connect with colleagues within the association management profession while addressing important management topics and sharing time with NAEPCs webmaster. [Register Here](#)

\*Council-by-size sessions will incorporate a potpourri of topics related to council operations in a virtual environment with leaders from similarly sized councils.

**“Pick Four” Webinar Package**

**[HOT TOPIC]** NAEPC understands that councils want compelling virtual programming options to supplement its regular calendar of events, especially today. To accommodate this need, we are 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.*



**BEST IDEA CORNER: Planning for a New Season**

Summer is historically a very quiet time for councils as far as events go, but it is often a busy time with regard to planning for the upcoming season or year, especially for those councils that change boards on July 1<sup>st</sup> (or near this date). Even those councils that are not changing officers can benefit from a brief review of important activities to consider as a new programming season kicks off. Remember that this list is a starting point, feel free to add or subtract as your council's activities dictate.

- Set and share schedule of board meeting dates and times so that the entire leadership can block the time in their calendar
- Schedule a transition meeting so the incoming and outgoing presidents can share goals and best practices
- [Send NAEPC an update of board members & their contact details](#)
- Activate key committees like programming and membership
- Create a budget
- Appoint someone to the “[NAEPC Liaison](#)” position and make sure to share that person's name and contact details with the national office
- Update your website after conducting a yearly review of all pages, making sure to refresh the message from the president, officers, etc. (Don't have a website? [Contact NAEPC!](#))
- Decide who will be attending the [upcoming events planned for council leaders](#)
- Make sure all board members have joined the [group on Linked in for council board members](#)
- Gather materials from NAEPC to ensure that your members are well-versed in the benefits they can take advantage of / consider [scheduling a 30-minute benefit review call](#) with the national office

- Discuss whether your EPC will participate in key NAEPC programs, like the “[Every Council Campaign](#),” Accredited Estate Planner® designation [Council Nomination Program](#) (a \$500 stipend is available to host an AEP® Informational Session during 2021), the [Council of Excellence Award](#) & the [LSI service](#)



**58<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference · November 2 – 4, 2021 - Registration is Open!**

*Who Should Attend?*

The 58th Annual NAEPC Advanced Estate Planning Strategies Virtual Conference features well-known presenters on advanced topics of interest to allied professionals and provides opportunities for attendees to cultivate multi-disciplinary relationships while collaborating on cutting edge ideas and trends. The conference educational sessions are for every member of every estate planning council and all estate planning professionals.



See the full schedule of presenters and activities, learn more, review the most up-to-date details, and register [on our website](#).

The registration fee provides an "all access pass" so you can come and go as you please during the event, choosing sessions that are most meaningful to you and your practice and visiting with sponsors and exhibitors at a time that is convenient for your schedule.

<u>Member Type</u>	<u>Registration Fee</u>
Accredited Estate Planner® Designee or Estate Planning Law Specialist Certificiant	Complimentary
At-Large Member or Member of An Affiliated Local Council	\$95
Non-Members and Guests	\$250

**Continuing Education Credit**

Continuing education credit will be requested for Certified Financial Planner™ (CFP®) and Certified Trust and Fiduciary Advisor\* (CTFA) designees and will be available for [Accredited Estate Planner®](#) (AEP®) designees. Credit and certificates of completion will be available only to those who attend the LIVE VIRTUAL conference general sessions and complete attendance verification requests if prompted. In addition, a certificate of completion will be available for those who are able to self-file, attend the LIVE program, and complete attendance verification requests if prompted. *The 58th Annual NAEPC Advanced Estate Planning Strategies Virtual Conference will not be filed for state legal or insurance credit or accounting credit. A certificate of completion will be available for those professionals within these disciplines who are able to self-file/report, attend the LIVE program, and complete attendance verification requests.*

**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**

Planning for Business Owners and Trusts in Light of Changing Income Tax Rates  
Steven B. Gorin, JD, CPA, CGMA®, AEP® (Distinguished)

Live August 11<sup>th</sup> from 3:00 pm ET – 4:00 pm ET

[Learn More and Register Here](#)

<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
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](#).

#### 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 ·

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, directors and staff 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.



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