

August 2018 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

- Using Webinars as Creative Programming Options
- Join the Council Leader Group on LinkedIn
- Exciting Changes to Council Leadership Day and the NAEPC Advanced Estate Planning Strategies Conference

IN EVERY ISSUE

- Annual NAEPC Advanced Estate Planning Strategies Conference: November 6 - 9, 2018
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



Using Webinars as Creative Programming Options

Trying to engage younger members? Tired of the same meeting format?

As your council creates or refines its programming schedule, why not consider adding a webinar or two? Programming is a key component of member satisfaction, growth, and retention, and distance-learning programs are a great way to bring your EPC high-caliber speakers with little or no cost. Councils have reported offering the webinars as a regular part of their schedule, for special “meet up” brown bag events, and even as a free member benefit or special program for AEP® designees. Contact the NAEPC office today to learn more about your options and how group webinars can enhance your EPC! **[HOT TOPIC]** [All councils can receive one complimentary webinar each calendar year!](#)

Join the Council Leader Group on LinkedIn

NAEPC maintains a group on LinkedIn just for council leaders. Join today to connect with others 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.)

Exciting Changes to Council Leadership Day and the NAEPC Advanced Estate Planning Strategies Conference

The annual conference has a new look and feel! What’s new?

- The conference is **earlier** in November and will take place from November 6th – 9th.

- **A new schedule** · The pre-conference sessions for council leaders (also known as Council Leadership Day) will now take place on Tuesday, November 6th and include less general session time, more small group discussion, and “learning pods” based on topics of interest so your council can choose what is most important and your attendees can focus their time on those topics.
- **More education and CE** · Technical education now occurs on Wednesday, November 7th, Thursday, November 8th, and Friday, November 9th. The program now offers up to 17 hours of continuing education credit*.
- **Additional free time** · We’ve added a bit more free time into the schedule so you can relax at the resort or explore Fort Lauderdale at your leisure

Learn more about the 55th Annual NAEPC Advanced Estate Planning Strategies Conference [on our website](#) or within the next section of this newsletter.

**Individual states and governing bodies determine the total credit hours awarded.*



55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders

[HOT TOPIC] The [55th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders](#) is scheduled from November 6 – 9, 2018 in Ft. Lauderdale - **now is the perfect time to register your council’s attendees and to share details about the conference its members.** The program will provide two and one-half days of continuing education credit for the various estate planning disciplines and create an opportunity for your members to develop valuable relationships with professionals from across the country. The contact on record for your council will soon be receiving a supply of the full conference brochures, please share this information and encourage your members to attend through email and in person at meetings and events.

We hope that your council will send multiple executive committee members to Council Leadership Day on Tuesday, November 6th along with your council’s executive*. > [Learn more about Council Leadership Day](#)

**Council Executives, or paid council staff, are always eligible to attend the annual conference with their registration fee waived.*

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 (to watch at a time that fits your schedule) and attendees 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.

[HOT TOPIC] Next Webinar – Special Date and Time!

Professional Collaboration: The Rock Star vs. the Whole Band
 Wednesday, September 5, 2018 · 11:00am - 12:00pm ET
 Heidi K. Gardner, PhD

Cross-discipline collaboration allows you to serve more sophisticated clients on higher-value issues and to do so more efficiently and holistically than you could do alone. So why do many professionals resist? Is it the

perceived inefficiency, a lack of trust in others' competence, or the lure of being a rock star instead of band member? This intermediate session explores practical steps for overcoming obstacles to the kind of "smart collaboration" that generates higher revenues, boosts your reputation and serves clients best.

Heidi K. Gardner, PhD, is a Distinguished Fellow at Harvard Law School's Center on the Legal Profession and Faculty Chair in the school's executive education courses. Previously she was a professor at Harvard Business School, a consultant with McKinsey & Company, and a Fulbright Fellow. Dr. Gardner's best-selling book "Smart Collaboration: How Professionals and Their Firms Succeed by Breaking Down Silos" was published by Harvard Business Press in 2017. > [Learn more and register](#)

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)	\$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 made 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](#).**

New Benefit

[ACTEC Trust and Estate Talk](#)

The American College of Trust and Estate Counsel, ACTEC, is a professional society of peer-elected trust and estate lawyers in the United States and around the globe. [ACTEC Trust and Estate Talk](#) is a free weekly podcast series that offers wealth professionals best practice advice, insights, and commentary on subjects that affect the profession and clients. Past topics have included *What Should Attorneys have in their Engagement Letters*, *State Law Pitfalls*, *Powers of Appointment*, *Security of Clients' Information*, and *9100 Relief*. You may listen and subscribe to the series through many popular podcast players and new podcasts are also announced weekly on [LinkedIn](#), [Facebook](#) and [Twitter](#).

Click on the links below to browse the list of all by category, or see the [full list of opportunities](#).

- [NAEPC-Provided Benefits](#)
- [Educational Opportunities](#)
- [Marketing and Website Design Services](#)
- [Presentation Materials and Office Supplies](#)

- [Software](#)
- [Subscriptions and Publications](#)
- [Complimentary Resources](#)
- [Discipline-Specific Information](#)
- [Other Benefits, Programs & Services](#)

Please remember... all members must utilize a user name/password to access 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 ·

All councils are encouraged to update NAEPC each and 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?

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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.

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The Association of Choice for Estate Planning Professionals