

August 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

- New Member Benefit
- Benefit Review “Cheat Sheet”
- Council Leadership Day Learning Pod Topics and Descriptions

### BEST IDEA CORNER

- Three Ways to Keep Senior Members Engaged

### 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?



### New Member Benefit: MileMark Media, LLC

MileMark Media exclusively builds law firm websites. They utilize their extensive industry knowledge and incorporate dynamic strategies from dozens of studies on optimizing conversions and implement best practices that support their findings. MileMark Media offers NAEPC members a 10% discount on all law firm website and marketing packages.

Learn more about this benefit and others available to your council and its members at the [NAEPC website](#).

### Benefit Review “Cheat Sheet”

**[HOT TOPIC]** Does your council want a refresher on the benefits provided with your council’s affiliation? Click [HERE](#) for a brief review of the benefits we provide to your council and its members. Questions or want a more in-depth review? Give us a call at 866-226-2224.

### Council Leadership Day Learning Pods & Topics

Each year in conjunction with the NAEPC Advanced Estate Planning Strategies Conference, NAEPC provides one full day of education for the board, officers, and staff executives\* of our affiliated councils - the day is called Council Leadership Day (or the “Pre-Conference Sessions for Estate Planning Council Leaders”). Attendees interact with fellow volunteer leaders, attend topic-based workshops called “Learning Pods” that address items your council has told us are important right now, and learn about NAEPC programs and

services that can help your council grow and thrive. **[HOT TOPIC]** [Learning pod topics and descriptions have been released for November – take a look today.](#)

*\*Council executives (paid staff) are encouraged to attend this day of activities. For this special group of individuals, we also offer complimentary registration, time with the NAEPC Webmaster, a private dinner on Tuesday evening, and a half-day development session on Wednesday morning.*



### **Best Idea Corner · Three Ways to Keep Senior Members Engaged**

If your council is like most, it has a strong pool of senior members. **[HOT TOPIC]** Keeping these individuals engaged is important to the history and health of your council so let's review three ideas to keep these individuals involved:

1. Consider adding a lifetime/emeritus membership – your council board can set criteria it is comfortable with
2. Include these individuals as mentors in a formalized mentorship program (bonus: this also engages younger members!)
3. Offer legacy awards for service or commitment to the profession

Looking for more great ideas? [Review the notes from the Regional Leadership Day events](#) and attend the annual conference!



### **56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-conference Sessions for Council Leaders**

November 5 - 8, 2019 · Las Vegas, Nevada

[www.NAEPC.org/conference](http://www.NAEPC.org/conference)

**[HOT TOPIC] REGISTER BY SEPTEMBER 30<sup>TH</sup> TO SAVE**

Now is the ideal time to register your council's leadership attendees and to share details about the conference with the members of your council. The contact on record for your council will soon be receiving a supply of the conference brochure, which is also available at [www.NAEPC.org/conference](http://www.NAEPC.org/conference).

#### **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 and solutions for membership growth and retention
- Expand your perspective on how similarly-sized councils are operating on a daily basis

#### **Reasons for your council's members to attend:**

- The conference offers the single best opportunity to grow their national network of estate planning professionals and learn alongside like-minded individuals who are also council members
- 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.NAEP.org/conference](http://www.NAEP.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.*

### 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 Webinars

Thursday, September 5, 2019 · 2:00 pm - 3:00 pm ET

**The Melton Family Case: Climbing the Philanthropic Learning Curve, a complimentary program provided with Trusts & Estates and sponsored by the Accredited Estate Planner® Designation**

Estate planners are rapidly adopting the NAEP Multi-Disciplinary Teaming Model. AEP® designees are in the forefront. In this webinar you will see that a particular specialty (advice on grant-making for philanthropic impact) is often missing, even when philanthropy is a big part of the estate plan.

Join panelists Phil Cubeta, CLU®, ChFC®, CAP®, AEP®, Tony Macklin, CAP®, and Jennie Zioncheck, CAP®, MFT to identify when strategic grant-making advice is needed, identify specialists providing such advice to family foundations and large donor advised funds, and decide whether you will handle such advice or hand it off based on the case study.

[REGISTER HERE](#) for this complimentary webinar

Wednesday, September 11, 2019 · 3:00 pm - 4:00 pm ET

**Growing Your Firm's Revenue using the Non-Grantor Trust State Income Tax Chart with Steven J. Oshins, Esq., AEP® (Distinguished)**

This program illustrates a number of different opportunities to save state income tax using different non-grantor trust options. Our presenter will show the attendees how to use a special two-page 50-state non-grantor trust state income tax chart in order to create opportunities to save state income tax.

[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 NAEP	\$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*

