



# National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

September 3, 2019

You are receiving this letter as the contact on record with NAEPC for your Estate Planning Council. **Please share this letter with your board of directors at its next meeting or via email if a meeting is not planned soon.**

If you feel this letter has reached you in error, please provide an officer update using the form found at [bit.ly/updateNAEPC](http://bit.ly/updateNAEPC).

Dear Estate Planning Council Leadership:

As your Council Relations Committee Representative, I volunteer my time to help the councils in my territory recognize the value of affiliation with the National Association of Estate Planners & Councils. Whether it's helping your council understand how being a member of NAEPC strengthens the council, or when making sure that your members are maximizing their usage of the resources available because of your affiliation, my goal is to make sure that your council is well-versed in these benefits.

Some of the most frequent challenges shared during the recent Regional Leadership Day Conferences were struggles with membership growth and the cultivation of younger professionals. At each of these sessions, attendees shared openly about what

"Everything about the day was helpful and I plan to bring it all back to our council board as well as the broader membership."

2019 Regional Event Attendee

has worked for their council and what has not, and each identified at least one take-away that they'll bring back to their board of directors. These included the formation of a member engagement committee, revisiting the meeting structure to re-engage members, and adding junior memberships for those with less experience than is required for regular membership. You may read the 2019 notes at [bit.ly/NAEPCRLD](http://bit.ly/NAEPCRLD).

The pre-conference sessions at the annual conference (also known as Council Leadership Day) also address these concerns, among others. In addition to sessions that allow councils of like size to discuss membership and programming considerations, the day includes small group workshops called "learning pods", which dive into topics you have told us are important to your council right now, including:

- Leading across Generations: Shifting from a Change to an Evolution Mindset with special guest Dr. Curtis Odom
- Creating a Member Milestone Program
- Crafting Exciting Events with Broad Appeal
- Creating a Sponsorship Program
- Best Practices in Welcoming New Members
- Employing an Association Executive
- Dipping a Toe into Social Media

You can learn more about the November 5 – 8, 2019 annual conference in Las Vegas, including a description for all of the learning pods, at [www.NAEPC.org/conference](http://www.NAEPC.org/conference). We hope that your council will send at least one representative and the staff executive\* and will continue to share information about the technical education sessions with your membership. After all, **Council Leadership Day is just one part of the annual conference and the 2 ½ days of sessions that follow compliment your council's programming calendar and are for every member of every estate planning council** - and we want yours to be well-represented.

Please continue to stay in touch with the benefits of affiliation by reading the *NAEPC Monthly Minute* email and by reaching out to me to answer your questions via telephone at «Phone» or by emailing «Email». You may also contact our national office to request a benefit review call or for other needs (866-226-2224 / [councilservices@naepc.org](mailto:councilservices@naepc.org)). I thank your council for its continued partnership with NAEPC; we are stronger when we work together and learn from one another.

Sincerely,

*\*Staff executives always attend the annual conference with the registration fee waived.  
Learn more at [www.NAEPC.org/conference](http://www.NAEPC.org/conference).*

The NAEPC Council Relations Committee

*The Association of Choice for Estate Planning Professionals*