

October 2020 Special Issue

National Association of Estate Planners & Councils

Monthly Minute

· the monthly administrative newsletter for affiliated local council officers ·

This email is being sent to you as an officer or staff 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.

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RESOURCES ·

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- [COVID-19 Resource Library](#)

Upcoming Council Leadership Events

Virtual Regional Leadership Day "Last Chance" Conference

Friday, October 16, 2020 from 1:00 pm ET - 4:00 pm ET

[REGISTER HERE](#)

If your council missed the first six virtual leadership conferences, or attended but would like to continue the conversation, this program offers a special "last chance" opportunity that will take place during three hours on a single day. The time will be spent in general and breakout sessions discussing the most important council operations issues like membership growth, retention and engagement, creating a compelling sponsorship program, diversity / equity / inclusion, programming, and learning about benefits provided by NAEPC. Learn more, see a sample agenda, and review notes from the prior years at <http://www.naepc.org/affiliated-councils/regional-leadership-day>.

Council of Excellence Virtual Award Ceremony & Regional Leadership Day "Wrap Up" Party

Tuesday, October 20, 2020 from 3:00 pm ET - 4:00 pm ET

[REGISTER HERE](#)

This special council leader event will include several components; all councils are encouraged to send at least one board member and the council's staff executive. Attend to:

- Hear the best new ideas and concepts captured during the Virtual Regional Council Leadership Day Conferences relating to membership growth, retention and engagement, sponsors, programming, etc.

- Recognize those councils that received awards during 2020, including the Council of Excellence, 5 Star, and Emerging Council Awards
- Receive the 2021 Council of Excellence application and participate in an overview of the process provided by the Council Relations Committee

Please don't miss these opportunities to connect with leaders from the national network of estate planning councils!

Special Staff Executive-Only Session on November 18th

Wednesday, November 18, 2020 from 12:00 pm – 2:30 pm ET

[REGISTER HERE](#)

Building upon the success of the Town Hall Roundtable held for council executives / administrators / paid staff, and combining with it the traditional executive-only session held in conjunction with the annual conference, the NAEPC staff team is hosting a special private session for council executives only. Connect with our network of council executives while addressing important topics like your council's response to COVID-19, technology platforms, engaging leadership, and diversity / equity / inclusion. Our webmaster, Bruce Newburger, will also on-hand to hear your feedback on your NAEPC-hosted website.

57th Annual NAEPC Advanced Estate Planning Strategies Virtual Conference Complimentary for Members & Guests



Be Part of Something BIG

November 10, 2020 · 11:30 am ET - 5:00 pm ET

The 57th Annual NAEPC Advanced Estate Planning Strategies Virtual Conference brings nationally-recognized speakers right to the desks of your members while offering them an opportunity to cultivate a national network of estate planning professionals. The conference is for every member of every estate planning council and all estate planning professionals and offers an experience that goes beyond a Zoom meeting. Join us to hear from industry leaders and NAEPC Estate Planning Hall of Fame® members:

Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished)

Richard M. Weber, MBA, CLU®, AEP® (Distinguished)

Natalie B. Choate, Esq., AEP® (Distinguished)

[View the full schedule of events on our website along with details about continuing education credit.](#)

Due to the incredibly generous support of [sponsors and exhibitors](#), this program is complimentary for members and guests. **Please share information about this conference with your members via email, making sure they know that the benefit is being provided because of your council's membership in NAEPC.**

Learn more about the program at www.NAEPC.org/conference.

2020 / 2021 "No Charge" Speaker Program

Each year, a variety of speakers are available to NAEPCs affiliated councils through the "No Charge" speaker program (council must fund travel, lodging and meeting expenses as outlined within the informational packet for live programs). This year, in response to COVID-19, speakers may be available for distance-learning programs via Zoom or a similar delivery method. This benefit has been wildly successful since its inception and we are pleased to provide the packet for the 2020-21 fiscal year [HERE](#).

Don't forget to take a look at all of [NAEPCs programming resources](#) as you continue preparing for the upcoming year/season.

Prorated Webinar Subscription

NAEPC understands that councils want and need compelling virtual programming options to supplement their regular calendar of events. To accommodate this need, NAEPC is offering affiliated councils on-demand* access to any four [webinars presented during the 2020 calendar year](#) for a reduced cost of \$400. When registering, choose the "Pro-Rated Group Gathering" option and our office will contact you promptly for your selections and to provide the link and password.

Councils that wish to offer continuing education credit must become the provider with their state and/or governing body(ies).

[Register for the series](#)

For questions about this opportunity, please email Sarah Butterfield at webinars@naepc.org.

**Programs must be offered to your members at least three days after the live viewing. NAEPC will provide a website link and a password, which can be used to test the technology and to show the program to council members and guests who have gathered together on a virtual meeting.*

Upcoming Webinars

Planning for International Families in a Time of COVID-19 with Joseph A. Field Wednesday, October 14, 2020 from 3:00 pm - 4:00 pm ET

This presentation will deal with a number of topics, including what is special for the American practitioner about international families and what it is they are looking for from their advisor. We will briefly review how they achieve these goals and the tools that are employed to get them there. We will also look at some of the impediments which have arisen in recent years and some particular problems associated with COVID. The program will end with some speculation on where we are headed and a few conclusions. [REGISTER HERE](#)

Virtual Shift: How to Work Online with Meetings, Webinars and More with Dean DeLisle Wednesday, December 9, 2020 from 3:00 pm - 4:00 pm ET

This informative webinar will show you the best practices to help stay connected and engaged with your teams and audiences going forward. We are in a new virtual world and now need to adjust our business and work practices. Dean will show you techniques using examples from Zoom, GotoWebinar, Microsoft Teams, and other collaborative software. In this period of adjustment, it is essential not only to learn to how to work remotely, but also stay connected with each other. We will show methods relating to meetings, webinars, building and sharing content and even having some fun in the process. This will be the new normal for a while, and in these times, we must stay connected and help each other adjust. [REGISTER HERE](#)

> [See all upcoming and previous webinars](#)

Webinar 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
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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.

National Estate Planning Awareness Week

October 19-25, 2020

National Estate Planning Awareness Week was adopted in 2008 to help the public understand what estate planning is and why it is such a vital component of financial wellness. > [Read a full copy of the resolution](#)

If your council wants to do *something* for National Estate Planning Awareness Week, but isn't quite ready to jump in to an in-person event, we can help. [Download the "Quick Start" kit](#), an informational packet developed for estate planning councils that provides the most basic information about National Estate Planning Awareness Week. It's perfect for those councils that wish to participate without planning an in-person program. The materials within can be used "as-is" or modified to meet the needs of your council.

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