

December 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 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.

Scan this message for [HOT TOPICS]!

HIGHLIGHTS

- 2020 Council of Excellence Application
- New Website Features & Tutorials

BEST IDEAS CORNER

- Sourcing Speakers and Topic Ideas to Fill Your Programming Calendar

IN EVERY ISSUE

- 57th Annual NAEPC Advanced Estate Planning Strategies Conference
- Upcoming Webinar
- Benefits Available to Members of Your Council
- Officer Update Form
- Are you LinkedIn?



2020 Council of Excellence Application

It's here! [HOT TOPIC] Download your council's copy of the 2020 Council of Excellence application [online](#).

NAEPC considers the application to be a roadmap of best practices; things that help a council run smoothly and support a great member experience. It has been developed over many years of interaction with councils and their leaders and represents our current understanding of the practices that breed success. At the same time, the application is a reciprocal learning experience. The narrative portion gives NAEPC an opportunity to learn more about your council and what is happening within the council network.

Applications are due on or before May 15, 2020.

New Website Features & Tutorials

The [NAEPC Website Solutions](#) available to your estate planning council are easy to use, economical, and continuously enhanced. During the second half of 2019 we launched several new and often-requested features and functions:

- The ability to schedule future email and text communications
- Sponsor levels expanded from four to seven
- A "Join the Mailing List" form
- The option to print or export event RSVPs by a date range

- More compact formatting for the document library
- Administrative access to cancel a member renewal

[HOT TOPIC] We also hosted two tutorials in December: “Your Council’s Event Calendar: Best Practices and Maximizing its Functionality” and “Settings 101: Learning More about Your Website and its Options.” These sessions help enrolled councils maximize the functions of the website and provide an overview of best practices. The archives are available within the “News” page of the administrative hub.

Interested in learning more about the NAEPC Website Solutions or looking for guidance on use of the council’s website for issues not addressed in the first two tutorials? [Contact our national office for assistance.](#)



Best Idea Corner •

Sourcing Speakers and Topic Ideas to Fill Your Programming Calendar

NAEPC offers [multiple resources](#) to help your council fill its programming calendar:

"No-Charge" Speaker Program

NAEPC offers each affiliated local council one speaker or webinar each year at no charge through the "No-Charge Speaker Program." The participating speakers are either current board members of NAEPC or past presidents and will offer both a technical presentation and a bit about NAEPC with no honorarium, although the council is responsible for travel and lodging costs.

Robert G. Alexander Webinar Series

The Robert G. Alexander Webinar Series is available to councils for live or on-demand group showings. All councils can receive one complimentary webinar each calendar year as a part of the "No-Charge" Speaker Program.

Input from Other Councils

The national website offers a newly-searchable calendar of council events that includes the name of the hosting council, speaker, and topic. Your leaders are also welcome to join the NAEPC Council Leader sub-group on LinkedIn to interact with council leaders from across the country, initiate and participate in council management-specific dialogue, and to receive regular posts from NAEPC.

Online Speaker Library

The NAEPC Online Speaker Library offers a variety of presenters who have expressed an interest in speaking to your affiliated local council. Each speaker listing includes contact information, a list of topics, total presentations per year, requirements, years of experience, and a list of the speaker's expertise.

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



57th Annual NAEPC Advanced Estate Planning Strategies Conference •

Join us for NAEPC's return to Fort Lauderdale!

November 3 – 6, 2020

Plan now to attend and to share information with your council's members about the [Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders](#). The conference program offers one day for leaders of estate planning councils (Council Leadership Day, Tuesday, November 3rd) and two and one-half days of continuing education for every estate planner (Wednesday, November 4th through Friday, November 6th). The Annual Conference is open to all estate planning professionals, including every member of your EPC!

[HOT TOPIC] Reasons for your council to send an officer and the council's staff executive/administrator* to Council Leadership Day:

- Participate in sessions that address the issues that are most important to your council
- Learn creative ideas for membership growth and retention, including how to find/engage younger members
- New programming ideas

Reasons for your members to attend:

- 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
- Network with estate planners from around the country
- Competitive registration fee with most meals included and a reduced rate for EPC members

Visit www.NAEPC.org/conference for more information.

**Council staff executives/administrators attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.*

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 Webinar

Wednesday, January 8, 2020 · 3:00 pm - 4:00 pm ET

The NEW Reverse Mortgage – 5 Ways Housing Wealth Is Changing the Estate Planning Conversation with Don Graves, RICP®, CLTC®, CSA

[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 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.

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 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. [Use the new online form today!](#)

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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