

LEIMBERG INFORMATION SERVICES, INC. (LISI)
Fast, Frank, Incisive Analysis



LEIMBERG ACCESS FOR COUNCILS



By taking advantage of the NAEPC Leimberg Information Services (LISI) member benefit program, your council members will have on-demand access, through a dedicated Estate Planning Council portal, to Leimberg Information Services' huge database of proposed and recent legislation, regulations, cases, rulings, and much more.

LISI provides financial service professionals fast, frank and incisive analysis of proposed and recent legislation, regulations, cases, and rulings - and access to those posted throughout the year. These commentaries are instantly accessible through LISI's incredibly powerful search engine that will allow members to create customized searches to locate specific topics, references, and citations of particular interest to them faster and more efficiently than ever before.

Members will receive weekly email updates from LISIUpdate@naepc.org that include LISI highlights from the previous week. In addition, NAEPC sends a monthly tip or tool to the council's contact to assist in maximizing the subscription's value to your members. Our goal is to support your efforts in reminding your members they have a powerful search engine available at their fingertips, and how to access it. Council tools include PowerPoint presentations to share at meetings, handouts to distribute, brochures, and email text to include in your communications.

▪ **Cost to NAEPC affiliated councils** ▪

- To enroll in Jan., Feb., March, or April \$24/member
- To enroll in May, June, July, or Aug. \$20/member
- To enroll in Sept., Oct., Nov., or Dec. \$30/member *

*covers the last 4 months of the year and all of the following year.

The Initial payment is due with the enrollment form and is non-refundable. The yearly non-refundable renewal must be received along with an updated membership roster on or before the due date to remain current.

ALL members of a council must be enrolled.

A list of members' email addresses must be submitted electronically in Excel to:
LISIUpdate@naepc.org using the following format: First Name, Last Name, Email Address.

LEIMBERG REGISTRATION FORM

Council Name: _____

Number of Current Council Members: _____

Please designate a Leimberg Contact to be the council's connection for all LISI information.

Contact Information for Council's designated Leimberg (LISI) contact

Name: _____

Company Name: _____

Address: _____

City, State Zip: _____

Phone: _____

Email: _____

Dues Worksheet:

Enroll in Jan – April: \$24 x # of council members (*total active membership) = total due

Enroll in May – Aug: \$20 x # of council members (*total active membership) = total due

Enroll in Sept – Dec: \$30 (includes the following year) x # of council members (*total active membership) = total due

*** This is not negotiable.** Members *may* be contacted by Leimberg Information Services directly during their enrollment and/or after termination of the council subscription.

The Initial payment is due with the enrollment form and is non-refundable. The yearly non-refundable renewal must be received along with an updated membership roster on or before the due date to remain current.

TOTAL DUE: \$ _____

Payable upon receipt

Charge my credit card \$ _____ MasterCard Visa American Express Discover

Card Number: _____ Exp Date: _____

Signature: _____

- or - **Make check payable to: NAEPC**

Mail to: NAEPC • 2001 Crocker Road, Ste. 510 • Westlake, OH 44145

Fax: 216-696-2582

Please submit this form, your payment, and an Excel spreadsheet containing your current active membership with the following fields:

First Name | Last Name | Email Address

Please send this roster to: LISUpdate@naepc.org

NOTE: Enrollment cannot be processed until the spreadsheet has been received.

After this form, payment and the database have been received and processed NAEPC will send you and your membership directions on how to access the Leimberg Information Services (LISI) website and set up usernames and passwords.