

Council of Excellence, 5 Star & Emerging Council Awards

Instruction Packet for Awards in 2027



**5 Star
Council**

**Emerging
Council**



2027 Application Packet & Instructions

Thank you for your interest in completing the 2027 *Council of Excellence Award* Application. The National Association of Estate Planners & Councils *Council of Excellence Award* recognizes councils affiliated with the NAEPC that are positioned toward success. This application pertains solely to your council and its activities from **July 1, 2025, through June 30, 2026**. We look forward to receiving your application on or before **November 1, 2026**.

AWARD HISTORY



The *Walter Lee Davis, Jr. and Leonard H. Neiman Council of Excellence Award* was created in 2014 and is named for two individuals who sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations

Committee, a group of volunteer members charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years. He worked tirelessly to organize information about affiliated and unaffiliated councils around the country, and to contact their leadership to explain the benefit of membership.

AWARD INFORMATION

Applicants are eligible for one of three awards granted through the application- *Council of Excellence*, *Five Star Council*, or *Emerging Council*.



Awards are available in each of the following council categories:

- Extra Small/Small (1-100 members)
- Medium (101 - 250 members)
- Large (251 - 400 members)
- Extra Large (401 members or more)

Should you have questions during the process, please contact Sarah Pierce at councilservices@naepc.org or 866-226-2224.



2027 Application Packet & Instructions

The *Council of Excellence Award* celebrates a select group of councils that are positioned for success and focuses on council traits that have been proven to keep councils of all sizes thriving. Each council achieving a *Council of Excellence Award* will receive:

- Complimentary registration for **two** people to attend the April 2027 Estate Planners Forum at the Saddlebrook Resort in Wesley Chapel, Florida (near Tampa Bay)
- The opportunity to book an event with one of the "No-charge Speaker Program" speakers, with NAEPC covering reasonable travel and lodging expenses for the speaker
- An announcement of the award in the NAEPC newsletters and on www.NAEPC.org
- Permission to advertise your status as a Council of Excellence Award recipient to highlight your council in print and online materials

The *Five Star Council Award* is an honor presented to councils that exhibit strong qualities and employ best practices. Each council achieving a *Five Star Council Award* will receive:

- Complimentary registration for **one** person to attend the April 2027 Estate Planners Forum at the Saddlebrook Resort in Wesley Chapel, Florida (near Tampa Bay)
- Permission to advertise your status as a *Five Star Council Award* recipient to highlight your council in print and online materials

At its discretion, the committee may also bestow the *Emerging Council Award*, an honor presented to those councils that have demonstrated significant accomplishment but have not quite qualified for the *Council of Excellence* or *Five Star* awards. Each council achieving an *Emerging Council Award* will receive:

- Permission to advertise your status as an *Emerging Council Award* recipient to highlight your council in print and online materials

Each application will be assessed in the following areas: Membership, Programming & Communication; Leadership, Council Operations & Financial Health; General Information; and Involvement with NAEPC.

The 2027 award ceremony is currently planned to take place at the Estate Planners Forum on May 5, 2027.

Should you have questions during the process, please contact Sarah Pierce at councilservices@naepc.org or 866-226-2224.



2027 Application Packet & Instructions

GETTING STARTED

In order to begin your application, please follow the instructions below. [Please consider only the council's activities from July 1, 2025, through June 30, 2026, when completing the application.](#)

1. To begin, click [HERE](#). You will be taken to the online submission form, hosted in Droplet.
2. Fill in the initial GENERAL INFORMATION Section, then Click the **Save Progress** Button. A message will pop up asking you to enter your Full Name and Email Address.

A screenshot of a "Save Your Progress" dialog box. It has a black header with the text "Save Your Progress". Below the header, there are two input fields: "Full Name" and "Email Address" with a help icon. At the bottom, there are two buttons: "Cancel" and "Done".

3. Enter the contact information for the Primary person who will be completing the application.
4. You will receive a note on the screen that your progress has been successfully saved.



Successfully saved
Council of Excellence Application

You can close this tab.

[Back Home](#)

5. At this time, Droplet will send you the link to your saved progress via email, which you can use to access the form as often as you'd like until the final submission has been sent in.

A New Draft Submission Has Been Created!



no-reply@mail.droplet.io
To: Sarah Pierce

Hi Sarah,

A new submission has been drafted and assigned to you.

[Click here to complete the submission.](#)

Should you have questions during the process, please contact Sarah Pierce at councilservices@naepc.org or 866-226-2224.



2027 Application Packet & Instructions

6. This link *can* be shared with others who will be involved in the completion of review of the application but be mindful that anyone with it can edit the submission.

An alternative is to open the form, then click Ctrl-P on your keyboard, which will open a Print Dialog box where you can save the form as a PDF or print it. This will allow you to collect feedback from leaders without giving them access to make changes to the application. **You must still complete the form online to apply for the award.**

We offer several months of time to review and complete the application to allow councils to thoughtfully consider their answers, but please remember that [only the council's activities from July 1, 2025, through June 30, 2026, when completing the application.](#)

This year we have eliminated the request for a cover letter and/or additional documents to introduce your council, in favor of emphasizing the Spotlight on Success Section of the application. Please carefully read the application instructions for the Spotlight and include relevant council details in that area of the application.

Please provide thorough responses to the questions asked near the checkboxes in each section.

- We ask those questions purposefully so please answer them in the space provided. We would like you to share different information within the narrative sections than we have asked in the questions.
 - Please be thoughtful in your response and answer the question completely.
7. When you have **FULLY COMPLETED** the form, including adding all required and optional uploads, click the **Submit** button at the end of the application. (If there are any required sections missing, you will receive an error message.)

Once you **Submit**, you **CANNOT** make any further changes to your application.

A screenshot of the application form interface. It shows a white rectangular area with a thin border. Inside, there are two buttons: a light gray button on the left labeled "Save Progress" and a black button on the right labeled "Submit".

**To begin your council's application, click [HERE](#).
Applications are due on or before November 1, 2026.**

Should you have questions during the process, please contact Sarah Pierce at councilservices@naepc.org or 866-226-2224.