

COUNCIL OF EXCELLENCE AWARD Application Instructions

2025



NAEPC

**Council of
Excellence**



Thank you for your interest in completing the 2025 *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 **May 1, 2024 through April 30, 2025**. We look forward to receiving your application on or before **May 16, 2025**.

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)

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** members to attend the full [Annual Estate Planning Strategies Conference and Council Leadership Conference](#) in from October 19-23, 2025
- 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** member to attend the Council Leadership Conference from October 22-23, 2025 (starting midday on 10/22 and ending midday on 10/23)
- 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.

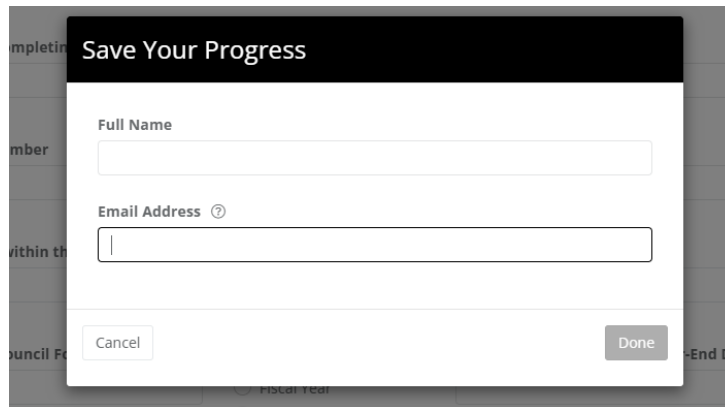
The award ceremony is currently planned to take place at the [Annual Estate Planning Strategies Conference](#) during the Council Leadership Conference.

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

APPLICATION INSTRUCTIONS

We are utilizing a new service this year to collect applications, one that we believe will make the process simpler and more efficient. In order to begin your application, please follow the instructions below. **[Please consider only the council's activities from May 1, 2024 through April 30, 2025 when completing the application.](#)**

1. To begin, click on the link [HERE](#). You will be taken to the online Droplet Form.
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.



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



Successfully saved
Aug 01 10:35AM

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.

A New Draft Submission Has Been Created!



no-reply@mail.droplet.io
To: NAEPC Council Services



11:04 AM

You don't often get email from no-reply@mail.droplet.io. [Learn why this is important](#)

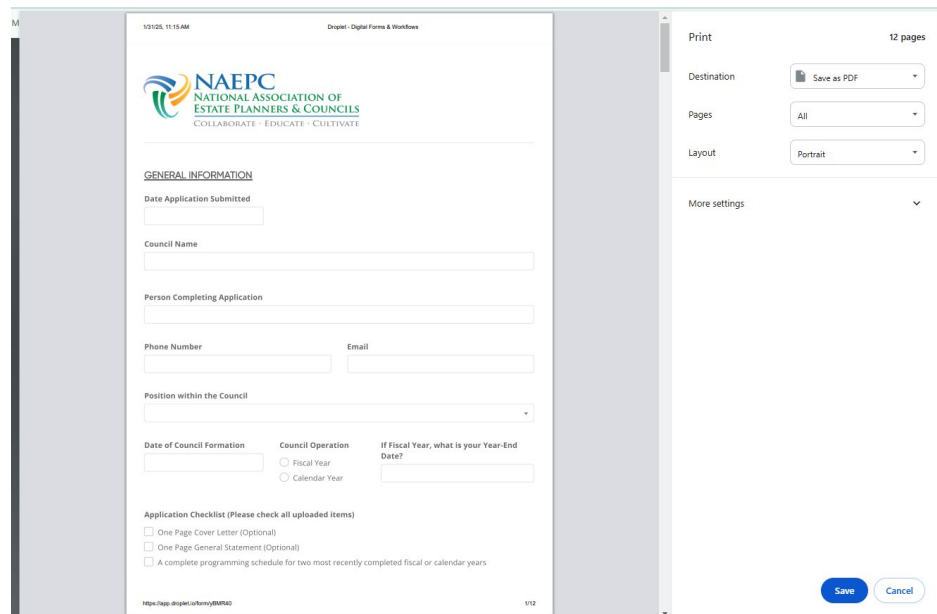
Hi Test,

A new submission has been drafted and assigned to you.

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

6. We offer several months of time to review and complete the application to allow councils to thoughtfully consider their answers and include information from **May 1, 2024 through April 30, 2025**. Each council *may* choose to share the emailed link to their individual submission with other leaders, which will allow multiple people to have access to the draft form to make changes. **Do not** share the link if you do not want other people to edit your 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.**

The image shows a screenshot of a web browser displaying the NAEPCC application form. The form is titled "GENERAL INFORMATION" and includes fields for "Date Application Submitted", "Council Name", "Person Completing Application", "Phone Number", "Email", and "Position within the Council". It also has sections for "Date of Council Formation", "Council Operation" (with radio buttons for "Fiscal Year" and "Calendar Year"), and "If Fiscal Year, what is your Year-End Date?". An "Application Checklist" section at the bottom asks the user to check off "One Page Cover Letter (Optional)", "One Page General Statement (Optional)", and "A complete programming schedule for two most recently completed fiscal or calendar years". To the right of the form, a print dialog box is open, showing options for "Destination" (Save as PDF), "Pages" (All), and "Layout" (Portrait). The print dialog also includes "Save" and "Cancel" buttons.

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.

The image shows the bottom portion of the application form. It features a large, empty rectangular box for a signature or message. Below this box are two buttons: a light blue "Save Progress" button on the left and a black "Submit" button on the right.

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