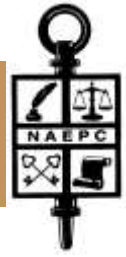


Talking Points



Council Leadership Day 2019

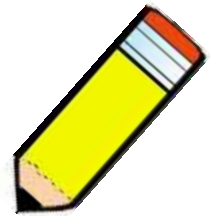
Council by Size Schedule

Sharing by Size · 2:45 pm - 3:45 pm

Conversation Break · 3:45 pm - 4:00 pm

Sharing by Size Continues · 4:00 pm - 5:00 pm

Opening Reception with Exhibitors · 5:00 pm - 6:00 pm (Brera Ballroom)



FOLLOWING UP....

Thank you for participating in the council sharing sessions today! Please take the information you have learned back to your board of directors by sharing a full report at its next meeting.

Notes from this session will be posted online at <http://www.naepc.org/conference/leadership-day> approximately 30 days following the program.

Please attend the Opening Reception at 5:00 pm in the Exhibit Hall

SHARING BY SIZE SESSION, PART 1 • 2:45 pm - 3:45 pm

30-Second Introduction •

Please share your name, council, current position on the board, and what you hope to take away from the session.

Membership •

- Please describe how your Membership Committee is chosen and its duties.
- Is your council's membership growing, static or diminishing? Why do you believe this to be the case?
- What are the newest *disciplines* added to your membership over the past 5 years as the landscape of estate planning has changed?
- Tell the group about recent changes to your council's *qualifications* for membership? Does your council accept Junior and/or Student members in some capacity?
- What has been the most successful campaign, program, or incentive that resulted in increased membership?
- What is your council actively doing to encourage younger members to join? Please share information about successful Junior or Student membership qualifications or recruitment campaigns.
- Please share information about your council's mentorship program.



CONVERSATION BREAK • 3:45 pm - 4:00 pm

Introduce yourself to someone new and share your 5 favorite songs, and why they are your favorite.

SHARING BY SIZE SESSION, PART 2 • 4:00 pm - 5:00 pm

Programming, Speakers & Topics •

- How does your council determine its programs? How far in advance does your council schedule speakers? Do you have a Programming Committee and how often does it meet?
- How does your council source speakers? Choose topics?
- Does your council have breakfast, lunch, cocktail & hors d'oeuvres, or dinner meetings?
- What types of events does your council host? Does your typical attendee change, depending on the type of event? Time of year?
- Name your top five speakers and/or topics from the past three years.

Please attend the Opening Reception at 5:00 pm in the Exhibit Hall

Potpourri Questions (time permitting) ·

- Share your council's committee structure
- How has your council kept older, more seasoned members engaged?
- Is your council surveying its membership? What happens with the results?
- Is your council staying relevant to the estate planning community? If so, how?
- How has your council shared its value with existing and potential members?
- How do you encourage networking among members?

30-Second Wrap-Up ·

If you could only take *one thing* from this sharing session back to your board of directors, what would that item be?

NEXT STEPS ·

NAEPC recommends making a plan to ensure that your council gets the maximum value out of your attendance at Council Leadership Day.

Here are some helpful next steps to get you started:

- Enjoy the reception in the Exhibit Hall
- Hear a really great idea? Schedule some time during the conference to talk to the person who shared it!
- Review your notes
- Schedule a “huddle” with others who attended with you to flush out ideas and to prepare a report / action plan for the council's board of directors (Attend alone? Block off time within your schedule to do so!)
- Read the session notes when they are released
- Report to the entire board of directors, including recommendations for new initiatives
- Create a plan to check-in with the leaders of the other councils you met during the event post-conference
- Start planning now for next year – decide who will attend the Ft. Lauderdale conference and create a plan to share the value of the conference with your membership



Please attend the Opening Reception at 5:00 pm in the Exhibit Hall