

National Association of Estate Planners & Councils

Member Council Resource

Creating a Liaison Position To NAEPC On Your Board of Directors

So many benefits to remember... so little time!

The National Association of Estate Planners & Councils recommends that every affiliated local council appoint a board member to a Liaison position and charging this person with presenting benefits, general updates from NAEPC, or new and exciting programs and initiatives to the board at each board meeting. In addition, this person may be the person who contacts the national office as questions about membership and services arrive. The goal of this person is to ensure that your EPC is taking maximum advantage of the benefits available to both the council and the members of your EPC each and every year.

Ideally, the Liaison will serve for multiple years to aid in continuity and familiarity.

Our board meetings are already jam-packed - what will the Liaison talk about or report on?

Likely topics are...

- Maximizing your membership in NAEPC
- What do we get for these dues anyway?
- Information contained with the monthly officer newsletter, the *NAEPC Monthly Minute*
- New initiatives or programs
- The yearly Council of Excellence Award program
- New benefits available to the members of your EPC
- The Council Nominated Accredited Estate Planner® designation program
- The Annual NAEPC Advanced Estate Planning Strategies Conference, including Council Leadership Day

You convinced us... now what?

Please contact the NAEPC office via email to councilservices@naepc.org with the name and full contact details of your liaison. The national staff will make sure that your Liaison is on the distribution for all emails intended for council leaders coming from NAEPC.

Helpful Tip:
NAEPC is always available to conduct a 30-minute benefit review call with your board of directors or a representative – contact the national office to schedule!

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The Association of Choice for Estate Planning Professionals

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