

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC)

Diversity, Equity & Inclusion Task Force Overview & Scope of Work

October 16, 2020

1. Background & History

NAEPC was approached in June 2020 by an affiliated estate planning council inquiring whether the association has a sample statement with regard to racial injustice / inequality for council use. Although such statement does not exist, the Executive Committee, at its June 12, 2020 meeting, was in full agreement that having one is important. Following the Executive Committee's discussion and during the June 19, 2020 board meeting, additional support in favor of initiatives related to diversity, equity and inclusion were heard. As a result, a task force was officially appointed on July 7, 2020 after consultation with President Garniewski and President-Elect Kirchick.

Board members Kit Mac Nee and Susan Travis serve as co-chairs and as of the date of this publication, the task force has 13 collaborative multi-disciplinary members and the full support of the association's board of directors and staff team.

2. Mission & Vision

The mission of the Diversity, Equity & Inclusion Task Force is to create momentum and to cultivate a foundation for growth in the number and type of diverse voices within the association's leadership, membership, and programming, as well as that of the councils affiliated with NAEPC, the profession as a whole, and various disciplines represented within.

These efforts will challenge the association's members to think beyond their current position, often one of indifference; ultimately enriching the lives of the membership and their communities as a whole.

3. Key NAEPC Board Contacts

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4. Goals & Projects

The task force acknowledges that a true commitment to improving diversity, equity & inclusion within the association and profession involves long-term and focused effort that contains immediate-, short-, and long-term goals. The Task Force also recognizes that it must be nimble and that other goals are likely to be borne from its early work.

Immediate Goals	Short-Term Goals	Long-Term Goals
<p>Craft a formal response to the ongoing racial discord in the country that can also be used by affiliated councils</p> <p>Review the association's existing diversity statement, suggest changes for board approval (if appropriate), and ensure that every affiliated council knows that it can be adopted as their own</p>	<p>Engage a specialist to educate the Board of Directors and committee volunteers with regard to unconscious bias or another applicable topic</p> <p>Consider a year-end donation to an applicable non-profit organization</p> <p>Draft an article for the <i>NAEPC Journal of Estate & Tax Planning</i> that speaks to the association's commitment and sets the stage for future projects</p> <p>Host a webinar as part of the Robert G. Alexander Webinar series on Diversity, Equity and Inclusion during March 2021</p>	<p>Stronger affiliated local estate planning councils with a diverse membership and pool of potential members from which to draw</p> <p>Present ongoing education related to the topic, including consideration of Council Summits</p> <p>Consider an award for councils and/or members</p> <p>A more diverse estate planning profession, individuals who ultimately benefit the country and all populations as a whole</p>

5. Summary

The state of the country today demands membership associations such as NAEPC and its network of affiliated local councils take a leading role: cultivating change, growth, and understanding among its membership and within the profession, and by providing education that speaks to diversity, equity and inclusion.