



February 2022

National Association of Estate Planners & Councils Minute

· the administrative update for affiliated local council leaders ·

This email is being sent to you as an officer, director, or staff executive for your NAEPC-affiliated local estate planning council; all board members currently on file with NAEPC receive the email.

HIGHLIGHTS

- Council Leader Education Series: Events for Your Council's Leadership
- **Safety Update!** What Your Council Needs to Know about Spoofing Attempts

QUICK CLICKS

- [Council of Excellence Application](#)
- Read the Latest Issue of [NAEPC News](#)
- [Join the Council Leader Group on LinkedIn](#)
- [Board Update Form](#)

IN EVERY ISSUE

- Advanced Estate Planning Strategies Conference
- Robert G. Alexander Webinar Series
- Benefits Available to Members of Your Council
- Connect with Us on LinkedIn

IN A HURRY?
SCAN FOR **[HOT TOPICS]**

Council Leader Education Series

[HOT TOPIC] NAEPC offers four types of learning and sharing experiences for estate planning councils and their leaders that have quickly become one of the most popular benefits of membership. Roundtables, Virtual Leadership Day, Website Tutorials, and Executive/Administrator-Only Sessions are a no-cost benefit to member estate planning councils and their leadership teams. These events provide a unique opportunity to learn alongside volunteer and staff leaders from within the NAEPC network - what's working, what's not, creative ideas, and new initiatives. Upcoming Events:

Roundtable: Council of Excellence Application Workshop
Monday, February 28, 2022 from 3:00 pm ET - 4:00 pm ET
[Learn More & Register](#)

Website Tutorial: Maximizing Event Planning Efficiency Using Event and RSVP Management
Wednesday, March 02, 2022 from 2:00 pm ET - 3:00 pm ET
[Learn More & Register](#)

➤ [See the Entire Schedule](#)

1120 Chester Ave., Ste. 470
Cleveland, OH 44114
councilservices@naepc.org · 866-226-2224

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Safety Update: What Your Council Needs to Know about Email Spoofing

[HOT TOPIC] Spoofing is a technique where a cybercriminal disguises themselves as a known or trusted person; it can take many forms. In so doing, a cybercriminal engages with their intended victim with a goal of stealing information, extorting money, or installing harmful software on a device.

Spoofing attacks can be simple or complex. A common type is related to email, which is what we are seeing a rise of within membership associations. Email spoofing occurs when an attacker pretends to be a known contact by either altering the “from” field of an email message to match a contact’s name or imitating the name and email address of someone who is likely to be a known contact. These criminals are smart and while the actual email address of your leadership may not be available publicly*, research is often done through other sources to find out what it is and that is used the basis for the spoofed contact address.

It is fairly common for attackers to spoof multiple points of contact, such as an email address and website, in order to initiate the communication and carry out the attack. For example, cybercriminals may spoof an email address in order to engage a victim and then use a spoofed website to capture the user’s log in details or other information.

Often times the cybercriminal will impersonate an association’s officer, for example, and contact a staff member or the treasurer to request that a check be issued or that gift cards be purchased, funds which ultimately make it into the hands of the criminal and are hard, if not impossible, to recoup.

So, what can you do to help prevent this from happening?

- Alert your board to the possibility of this type of scam.
- Trust your intuition. If it feels “off” or gives you pause, pick up the phone and check it out.
- If there is even a hint that an email may be fraudulent, do not click on anything within. Immediately and permanently delete it from your system. A real email can be resent after you’ve had a conversation with the sender.
- Watch out for tactics that attempt to convey a sense of urgency – someone needs help, the need is immediate, there is a legal issue that must be resolved, payment is past due, etc.
- Look at email address of the sender carefully. Does the actual email address match the name associated with it AND that of the person who is sending you the message? Watch for fake email addresses like “councilpresident@” or “councilboss@.”
- Require two signatures for checks over a pre-determined amount or adopt an internal policy that checks over a certain amount will be “cleared” by a second board member or officer. This is especially important for volunteer-run organizations or those with a single staff person.
- If you believe you may have been compromised, quickly and proactively change important passwords.

Please note that NAEPCs dues notices have recently been mailed via *postal mail* to the contact on record for your EPC on the association’s official letterhead. If you receive an email notification or an invoice that looks unfamiliar, please alert councilservices@naepc.org.

**The email address of your council’s membership and leadership is protected from public view and access for those councils that use the NAEPC-hosted website system. The only email that is currently available without the protection of a form is that of the council contact, found on the “Contact Us” page.*



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59th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders

November 15 – 18, 2022 · Fort Lauderdale Marriott Harbor Beach Resort & Spa

[HOT TOPIC] At this time, we are planning to meet in-person in November for a traditional annual conference! The committee is hard at work planning a safe event and a schedule that includes exciting speakers and topics that impact our multi-disciplinary members right now. Place the date on your calendar today!

➤ [Watch our website for updates](#)

Robert G. Alexander Webinar Series

The [Robert G. Alexander Webinar Series](#) provides councils and their members with accessible and affordable virtual education. Programs are available live and on-demand and one can choose to register for individual programs or for a series subscription. Councils can also register for a group gathering, which provides one feed to be shown to a group gathered together in a single location.

Continuing education credit is available at most NAEPC-hosted webinars for Accredited Estate Planner[®] designees. In addition, a general certificate of completion will be available for those professionals who feel the program satisfies their continuing education requirements and are able to self-file.

Upcoming Webinars

[Introducing the In Marriage QDRO[®] - A Brand New Option](#)

Marcus T. Foote, JD, and Stephanie N. Prestridge, JD
Wednesday, February 9, 2022 from 3:00pm - 4:00pm ET

[Paul S. Lee, JD, LL.M. \(taxation\), AEP[®] \(Distinguished\)](#)

Wednesday, March 9, 2022 from 3:00pm - 4:00pm ET

> Learn More and Register for the Council “Pick Four” Program, the Series, or Individual Programs at <https://www.naepc.org/events/webinar>.

Member Benefits

Members of your affiliated local council have access to a wide array of benefits at reduced or no cost. These offerings are a great way to build upon benefits your council is already offering with no additional work by your board! > See the [full list of opportunities](#).

New and Updated Benefits:

[All Language Alliance, Inc.](#)

[BAU Print and Mail Inc.](#)

[Docubank](#)

[FinancialAdvisors.com](#)

[Ruby](#)

[Special Needs Map, LLC](#)

[The James E. Hughes, Jr. Foundation](#)

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Connect with NAEPC and our Members on LinkedIn

[Council Leader Group](#) (private for council leaders)

[General Group](#)

[Accredited Estate Planner Designee Group](#) (private)



NAEPC Minute is an administrative report that does not take the place of [NAEPC News](#), the official newsletter of the NAEPC, sent to the members of those councils that have approved access through the [Every Council Campaign](#). Please contact the national office if you have questions about your council's status within the Every Council Campaign.



National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114
(866) 226-2224 - fax (216) 696-2582
admin@naepc.org

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