

56th Annual NAEPC
Advanced Estate Planning Strategies Conference
with Pre-conference Sessions for Council Leaders

November 5 - 8, 2019 · Las Vegas, Nevada



● Council Leadership Day Learning Pod Descriptions

EVENTS

Crafting Exciting Events with Broad Appeal

It's clear that the days of educational-only programs on the same day, time and location each month are behind us - members are demanding more diversity in programming. This session will address what makes for a well-rounded yearly programming calendar that appeals to a wide variety of members, will give leaders an opportunity to share what is working for their council and what is new, different or exciting, and how a change to a programming schedule can positively impact attendance and enhance member satisfaction.

Negotiating with Venues, Vendors & Service Providers

We have entered a new era with regard to meetings and events. Rising prices, new policies and fees, and unreasonable demands are fast becoming the "norm" in the meetings industry. Participants in this session, which will be led by a seasoned meeting planner and association manager, will participate in an open dialogue about overcoming these obstacles to create events that your council can be proud of and that won't break the bank.

MEMBERSHIP

Best Practices in Welcoming New Members

That person who has been lurking at your council's events as a guest has finally joined – now what? This session will address concepts for welcoming new members and brainstorm new ways to onboard members in a way that makes them feel welcome, inclined to remain active (and possibly wanting to get more involved).

Creating a Member Milestone Program and Service/Achievement Awards

5 – 10 – 15 – 20... Recognition of milestones is an important part of member engagement. This session will brainstorm best practices in recognizing member milestones, along with other ways to strengthen the bond with your members via service and achievement awards.

NAEPC
1120 Chester Ave., Ste. 470
Cleveland, OH 44114

866-226-2224
conference@naepc.org

Sessions subject to change.

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OPERATIONS

Becoming a Council of Excellence

The Council of Excellence Award, in addition to being NAEPC's highest council honor, is considered to be a roadmap of best practices from which every council can benefit. Attendees can expect to learn about the application and questions asked within, as well as what has made the winning councils so successful.

Creating a Sponsorship Program / Increasing Non-Dues Revenue

Many councils are creating or refining sponsorship programs and exploring other options like job posting services to help increase revenue, which may also allow your council to hire a staff person, keep dues low, support special initiatives, and continue to provide an exceptional membership experience. This session will address best practices and new ideas to grow revenue and create programs that will be exciting and appealing.

NAEPC Benefits and Resources Review

Much like the old American Express line, your council's membership in NAEPC has its privileges. Attend this session to learn about exactly what NAEPC provides to your council and its members and participate in a group discussion about how councils are making sure their members are up to speed on all of the opportunities available to them. This session will also include an explanation of the "Every Council Campaign", NAEPC's program that provides access to your member data for specific and targeted purposes and ensures that your members have the "piece of the puzzle" that connects your council to the national association.

Operations Checklist

It's July 1st and BAM – you're president! This breakout session will address the "must have" items in a council's operations checklist and offer a starting point from which to ensure that each yearly transition is smooth and consistent.

Usage of the Accredited Estate Planner® Designation Council Nomination Program

We know that the Accredited Estate Planner® designation is the only graduate designation in estate planning, but what's this Council Nomination program all about and how does it differ from a self-nomination? Attend this special session to learn about the privilege available to all estate planning councils affiliated with NAEPC, followed by open discussion of how councils have successfully implemented an annual program that assists with member engagement and retention.

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OPERATIONS, continued

Staffing Your Council: Employing an Association Executive

Having an executive allows an association's board of directors to take their focus away from daily administrative tasks like meeting preparation and dues mailings, and transfers that time and energy to direction, growth, and new initiatives. Often, however, there are concerns about the ability to find and pay for a qualified individual in this role. Attend this pod to learn more about the benefits of having a staff member, as well as finding, funding and integrating an association executive into your council's operations.

**This session is recommended for those councils that do not currently have staff/an association executive.*

TECHNOLOGY

Dipping a Toe into Social Media, What's Right for Your Council?

Options for a social media presence are plentiful and seem to be changing every day. So what's the best option for your council? Attendees will review the most popular platforms, conversations that should take place before creating a group or social media presence, and "must have" policies and procedures. Attendees will leave with the beginning of a sketch of a social media strategy for their council.

Making the Most of your Council's NAEPC-Hosted Website

Your council has this fantastic website – now what? This session will offer an opportunity to learn about maximizing the features of your NAEPC-hosted website platform and have your questions answered by the NAEPC team.

**This session is available only to councils that have a website hosted by NAEPC.*

NAEPC-Hosted Website Platform: About Us to Contact Us

Interested in learning more about the NAEPC website options? This is the session for you! Attend to learn more about the capabilities and features of the NAEPC-hosted websites and how they can assist your council in its daily operations and as a tool to generate non-dues revenue.

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SUPPLEMENTAL

Leading Across Generations: Shifting From a Change to an Evolution Mindset

Special Presenter: Dr. Curtis Odom, President @ Stuck On Start Coaching, and Executive Professor at Northeastern University D'Amore-McKim School Of Business

Today's estate planners are more than just advisors working in the field of business succession and estate planning, and executive and employee benefit plans. They are leaders who are required to drive faster adoption, gain greater ultimate utilization, and have higher proficiency in creating solutions for the changes impacting their businesses, and the changing demographics of their clients. In this one hour workshop and special addition to the Council Leadership Day Learning Pods, participants will discuss the following paradigms in a team environment:

Leading Through Phases Of Change
Managing Generational Dynamics
Shifting To More Agile Leadership

Making The Business Case For Evolution
Managing Evolution Within Your Business

Participants will leave this interactive session with an changed mindset on how to better navigate the generational dynamics at play in evolving their client approach, principles that also apply to the management of an Estate Planning Council.

Potpourri of Concepts and New Ideas - Council Operations

Didn't find something your council would like to discuss in the structured sessions? Sign up for this session to open a conversation about general council operations. No operations-related topic is off-limits, simply arrive to the event and NAEPC's leadership team will answer your questions.

Potpourri of Concepts and New Ideas - Visions of Tomorrow

Rapid and persistent advances in technology are threatening the traditional role of advisors across the entire spectrum of disciplines, and we are experiencing it in all sorts of ways. Multiple conferences and white papers are all asking the same question; "What must we do to survive and thrive over the next 10 years?" Join this session to participate in an open discussion about the future of the estate planning profession, the definition of estate planning, and other topics of importance to the profession.

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