



COUNCIL LEADER EDUCATION SERIES SESSION NOTES

Program Virtual Leadership Day for Large and Extra-Large Councils
Date August 15, 2023 and August 16, 2023

NAEPC UNIVERSITY

Benefits for Councils

- Part of the national network
- Best practices through training events, access to staff, and the [Council of Excellence](#) program
- [Programming Resources](#)
- [Website Solutions](#)
- Access to the network of council leaders at events and [leader group on LinkedIn](#)
- Leadership newsletter
- [Council Leadership Group](#) on LinkedIn

Relationship with Councils

- Members of NAEPC are Accredited Estate Planner® designees (approximately 2,200) and estate planning councils (approximately 270)
- NAEPC *does not* govern councils, indicate mandatory practices or procedures, or have requirements outside of the most basic discipline requirements (who the council must admit to membership)
- NAEPC *does* serve as a resource through its board, council relations committee, and staff while providing benefits for the council and its members.

What NAEPC asks of your Council

- Share information about the relationship verbally and in print
- Add a statement about affiliation to council's email signature
- Participate in the [Every Council Campaign](#)
- Empower the council's executive / staff member to be a leader in the relationship

Our Best Kept Secrets

- Secret #1: We don't have access to the council's members unless the council grants us that access.
- Secret #2: Council members do not know about NAEPC! We need your help to share the message, messaging, and be our advocate.
- Secret #3: The annual conference is an educational event for all council members – not just council leaders!

BOARD BEST PRACTICES

Seven Best Practices of a High-Functioning Board

1. Stay On Top of (and open to) New Risks, Opportunities and Best Practices
2. Keep Members Top of Mind
3. Cultivate an Agile Approach to Leadership
4. Be Purposeful in Selecting an Adaptive Board
5. Challenge Yourself on Your Diversity of Thinking
6. Employ Proper Governance
7. Explore All Routes to Keeping your Board Working Effectively and Efficiently

Ideas to Help Your Board Stay on Track and Ready for Each New Season

- Host a board orientation for executive leaders and new members
- Detail the expectations of board members clearly and invite feedback
- Make getting to know one another a priority through the entire year – board social, board activity, ample time for introductions and “getting to know one another” activities
- Schedule a full board meeting for high-level discussion items
- Make sure everyone on the board can verbalize the council’s value proposition similarly
- Ask “WHY” questions
- Set organizational goals that every committee works toward. Use these goals in tandem with the mission statement to ensure there will be no mission creep. (Hint: goals aren’t always about numbers.)
- Find out what members are passionate about and make assignments based on those passions
- Survey the board about their feelings on important topics

YEARLY NAEPC CHECKLIST FOR YOUR EPC

Things to do each year as leaders change or a new year starts...

- MAKE HAVING FUN A PRIORITY!**
- Schedule a transition meeting so the incoming and outgoing presidents can share goals and best practices
- For councils with staff, schedule a president : staff meeting to align roles, duties, and expectations
- Activate key committees
- Create the budget
- Appoint a board member to the “NAEPC Liaison” position
- Review and update all pages of website
- Update key documents
- Send a message from the new president to the membership
- Set timeline of key activities (survey, dues notices, awards, follow up, etc.)
- Create an editorial calendar for social media endeavors and assign responsibilities
- Announce programming schedule
- Review insurance policies (general liability and directors & officers’ policies are recommended by NAEPC)

UPCOMING EVENTS

- <https://www.naepc.org/affiliated-councils/council-leader-education>

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- Transfer records, documents, and passwords
- Plan a bank “signing party” and update records with merchant account provider
- Engage past leaders
- Send NAEPC an [update of board members & their contact details](#)
- Decide who will be attending the [events planned for council leaders](#) & register for the programs
- Make sure all board members have joined the [group on LinkedIn](#) for council board members
- Gather materials to ensure members are well-versed in the benefits provided by NAEPC
- Discuss whether your council will participate in key programs: the “[Every Council Campaign](#),” Accredited Estate Planner® designation [Council Nomination Program](#), the [Council of Excellence Award](#) & the [LISI service](#)

OPTIONAL BENEFITS OF COUNCIL MEMBERSHIP

- [LISI service](#) (optional benefit of membership, councils must participate)
- [Website solutions](#)

LEADERSHIP STRUCTURE

Leadership Structure

- The size of the board should be reflective of the size of the membership
- No “one size fits all” structure
- Providing a range in the number of required members can sometimes be helpful
- Understand and follow the bylaws; review with regularity

PROGRAMMING RESOURCES - [HTTPS://WWW.NAEP.C.ORG/AFFILIATED-COUNCILS/SPEAKERS-BUREAU](https://www.naepc.org/affiliated-councils/speakers-bureau)

- “No charge” speaker program
- Online speaker library
- Council network
- Robert. G. Alexander Webinar Series

ACCREDITED ESTATE PLANNER® DESIGNATION & COUNCIL NOMINATION

The [AEP® designation](#) is the only graduate-level designation in estate planning. Created in the 1990s, now with 2,200 designees, the program is available to attorneys, accountants, insurance and financial planning professionals, philanthropic professionals, and trust professionals who employ the team concept of estate planning. The designation is complementary to underlying degrees and designations.

Seven Core Requirements

1. Hold one of 12 qualifying degrees or designations
2. A minimum of five years of experience of which one is devoting at least 1/3 of one’s time to estate planning based on the NAEPC definition
3. Show excellent professional reputation and character through multi-disciplinary peer referrals
4. Commit to NAEPC Code of Ethics
5. Two educational courses through The American College (15 years or more of practice may exempt one from this requirement)

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6. Continuing education, both at the time of application and ongoing
7. Maintain a council membership, indicating a commitment to maintaining a strong local network of multi-disciplinary professionals

Requirements At the Time of Application

- Application fee
- First year dues
- Administrative & peer reviews

Council-Nominated AEP® Program

- Benefits member with a streamlined application, reduced application fee, reduction in number of years at which coursework is exempted
- Benefits council by providing a member recognition tool and member benefit, contributes to retention

MEMBERSHIP QUALIFICATIONS

- Flexible guest policy leads to new members
- Be open to more than the five disciplines
- Create categories of membership for younger individuals, students, more seasoned members, and those who may be on the periphery of the estate planning profession
- Unique member types: family dynamics professional, mortgage professional, organizers / liquidators, realtors that specialize in housing transitions

NAEPC BENEFITS FOR COUNCIL MEMBERS

- [Value Partners](#) (member benefit providers)
- Educational Offerings through [Annual Conference](#) and [webinar program](#)
- [NAEPC Journal of Estate & Tax Planning](#) with ability to opt members in

INSPIRING VOLUNTEERISM

9 Ways to Inspire Volunteers

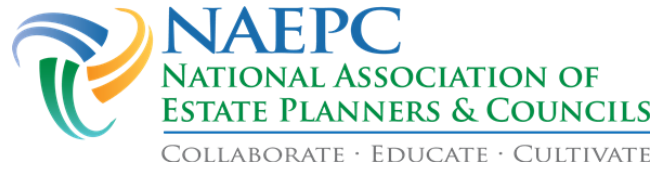
1. Make It Easy
 2. Offer Opportunities with Shorter Time Commitments
 3. Communicate the Value of Volunteer Work
 4. Respect Your Volunteers' Time
 5. Keep Volunteer Management Organized
 6. Spotlight Busy Volunteers
 7. Encourage Them to Invite Others
 8. Stay Connected with Regular Communication
 9. Consider Your Volunteers' Interests and Skills
- Short options for those who cannot commit to longer-term service

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ESTATE PLANNING LAW SPECIALIST CERTIFICATION

The [Estate Law Specialist Board](#) offers the only American Bar Association-accredited specialization in estate planning. Governed by an attorney-run subsidiary of NAEPC, the program's mission is to advance a reliable certification and enhanced level of competency among estate planning attorneys.

Seven Core Requirements

1. More than five years of practice
2. Devote 40% or more of professional time to estate planning
3. 36 or more hours of continuing education credit in the three years prior to application and ongoing
4. Verification of professional liability coverage
5. Recommendation from five colleagues, the majority of whom have known the applicant for 3 years or more and who are not related to the applicant or within the same firm
6. National examination
7. Annual renewal / 5 year recertification

MEMBER MILESTONES AND RECOGNITION

Types of Milestones

- Years of Membership
- Promotion from one type of member to another

Types of Achievements

- Practice-related achievements
- Speaking Engagements (to the council or other bodies)
- Outside Awards

Types of Awards

- Service to Council or Community
- Lifetime Achievement
- President's Award (president chooses the recipient each year)

MEETINGS & EVENTS

- Councils are offering meetings in a variety of ways at varying times, which is creating an element of success.
- It may be time to redefine success and expectations with regard to in-person meeting attendance.

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DIVERSITY, EQUITY, INCLUSION

- Boston hired a consultant
- Focuses both within and outside of the council within the greater community
- Student focus
- Start with presenters

SPONSORSHIP

Purpose and Importance of Sponsors

- Keep Dues Low
- Pay for Administration
- Pay for Website Subscription Fee
- Support Programs and Initiatives

Creating Your Council's Offerings Creatively

- "Global Support"
- Event-based options
- Website-only Sponsors
- Make it Fun

Be Clear about Benefits

Adopt Pricing, a Process, Kit, and Commitment Form

Communicate Offerings

- Email Distribution
- Sponsor Opportunities Page
- Social Media Groups

Maximizing Sponsor Exposure

- Get Creative
- Incorporation into Event Listings
- Multitude of Online Placements

Recognition in Letters / Messages from Leadership

- Post a 2-Minute Sponsor-Created Video

At Events

- Signage
- Visual placement on PowerPoint
- Verbal mention by leadership
- Literature table or materials on tables
- Microphone time (outline expectations clearly)

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COMMITTEE STRUCTURE

Committees are **ESSENTIAL** to the effective operation of an association because they assign very specific responsibilities to a group of individuals, create a “farm team” of potential future board members, and allow the board to focus on larger initiatives and growth instead of regular tasks like finding speakers. The two most popular are standing committees (often prescribed by the bylaws) and sub-committees. Although not formally recognized by *Robert’s Rules of Order*, organizations will also sometimes create a task force, which is a time-bound and outcome-focused group.

Popular committees: membership, sponsorship, governance, communication, programming, legislative, DEI, leadership development (mentoring the leaders of the future)

- Host a “meet the committee event where chairs can talk to interested parties about their work

FAVORITE TAKE-AWAYS FROM THE EVENT

- Speaker: Arniban Basu (Baltimore)
- Classify programs by type and level of education in marketing materials
- Offer different opportunities for engagement and attendance
- Negotiate everything!
- Refine success
- Bylaw review
- EPLS Certification
- Leverage national member benefits
- Engage young advisors
- A small step with regard to DEI is OK
- Charge past presidents with important tasks like sponsorship solicitation
- Grow the volunteer pool

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