

March 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 of Excellence Applications Due in Six Weeks
- April Events in the Council Leader Education Series
- Programming Resources

### QUICK CLICKS

- [Board Update Form](#)
- [Join the Council Leader Group on LinkedIn](#)

### 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]**

> [PAY 2022 DUES & SERVICE RENEWAL FEES HERE](#) <

### Council of Excellence Application

The 2022 Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award application is requested back on or before Friday, May 13, 2022, approximately six weeks away!

The award recognizes councils that provide a strong multi-disciplinary environment, honors those that provide an exceptional member experience, and is a roadmap of best practices or things that help a council run smoothly. This year you will notice a shorter and more streamlined application, a request for information with regard to your council's response to the global pandemic, and minor refinements to several key questions. Please consider applying on or before May 13<sup>th</sup>. > [Download the Application](#)

### April Events / Council Leader Education Series

**[HOT TOPIC]** Roundtable: Imagining Your Council Post-COVID - Strategies for Sustaining Membership and Engaging Members in New and Different Ways

Friday, April 22, 2022 from 1:00 pm ET - 2:00 pm ET

[Learn More & Register](#)

Roundtable: The [Council Nominated AEP® Program](#) and Its Benefit to Your Estate Planning Council

Wednesday, April 27, 2022 from 4:00 pm ET - 5:00 pm ET

[Learn More & Register](#)

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### Programming Resources

NAEPC has multiple resources for affiliated councils looking to fill their programming schedule... take a look today! **[HOT TOPIC]** Learn more about all of the options [on our website](#), including the “No-Charge” Speaker Program, which features current NAEPC board members, past board members, and national past presidents offering both a technical presentation and a bit about NAEPC with no honorarium!

### 59<sup>th</sup> 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*

NAEPC is planning to be face-to-face in November and we look forward to having your council’s leadership **and** membership well-represented for our return to in-person events! Registration is expected to open late next month.

The Annual Conference fulfills two purposes:

- A day of dedicated sessions for the *leaders* of the over 250 councils within the NAEPC network where small group workshops allow council leaders to share their experiences and learn from one another
- 2 ½ days of educational session for *every member of every estate planning council* with national and multi-disciplinary continuing education credit available

Confirmed educational session presenters:

- Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
- Ric Edelman
- Christopher R. Hoyt, JD, AEP® (Distinguished)
- Wendy S. Goffe, JD, AEP® (Distinguished) and Kim Kamin, JD, AEP®
- Amy K. Kanyuk, JD & Melissa Langa, A.B., JD, LL.M. (taxation), AEP®
- Michael A. Perlmutter, JD, CPA, CVA, ABAR

- [Add the Conference to Your Calendar](#)
- [Find More Information on our Website](#)

Don’t forget that council executives (paid staff members) attend the Tuesday and Wednesday sessions with the registration fee waived and participate in special executive-only events and meetings.

### 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 register for individual programs or for a series subscription. Councils can also register for a group gathering or the “Pick Four” package, both of which provide one feed to be shown to a group gathered together in a single location (in-person or virtually).



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### Upcoming Webinar

[Ten Ways to Protect Your Client's Digital Assets with Betsy L. Ehrenberg of Legacy Concierge](#)

Live April 20, 2022 @ 3:00 pm ET or register early for on-demand access

By the end of this advanced session, attendees will be able to identify digital assets and custodian protocols that create postmortem roadblocks to access, will have learned ways to assemble and organize keys to electronic records for data and document access and protection, and will have gathered strategies to motivate clients to discuss and protect digital assets during trust and estate planning and review.

Continuing education credit is available for Accredited Estate Planner® designees and a general certificate of completion will be available for those who feel the program satisfies their continuing education requirements and are able to self-file. The registration fee is \$40 for active AEP® designees, \$60 for council members, and \$100 for non-members.

> Learn more about the webinar series, register for the council “Pick Four” option, the series, or individual programs [HERE](#).

### 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](#).

### 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.



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