



May / June 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

- June Virtual Leadership Day: Your Opportunity to Connect with Council Leaders from Across the Country
- Preventing Spoofing Attempts that Cost Associations Money & Time

QUICK CLICKS

- [Join the Council Leader Group on LinkedIn](#)
The online community for council leaders and staff members
- [Board Update Form](#)
- [A Look Inside NAEPC](#) (PowerPoint Presentation)

IN EVERY ISSUE

- Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders
- Robert G. Alexander Webinar Series
- Benefits Available to Members of Your Council

IN A HURRY?

SCAN FOR **[HOT TOPICS]**

June Virtual Leadership Day: a “Spa Day” for your Estate Planning Council

Your Opportunity to Connect with Council Leaders from Across the Country

Monday, June 27, 2022 & Tuesday, June 28, 2022

2:00 pm ET - 4:00 pm ET both days

[LEARN MORE & REGISTER](#)

During this event we’ll cover important ideas, strategies, and initiatives related to member engagement, board and committee structure, membership qualifications, programming, sponsorship programs, diversity – equity – inclusion, onboarding new members, and other subjects that you tell us are important. **[HOT TOPIC]** *If your council attends only one leadership event this year; this is the event to attend.*

Preventing Spoofing Attempts

[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 and losses from a successful spoofing can be significant.

A common type is related to email, which is what we are seeing a rise of within NAEPC. 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

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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 items, such as an email address, website, and invoice, etc., 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 for an event or a deposit 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.

What can you do to help prevent this from happening?

- Alert your entire board to the possibility of this type of scam and discuss it regularly at board meetings.
- Beware of requests for wire transfers.
- 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 or reply. 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, the venue will be lost, 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.

**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.*



May / June 2022

**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

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!

The Annual Conference provides:

- A day of dedicated sessions for the *leaders* of the councils within the NAEPC network where small topic-based sessions allow for sharing of experiences and best practices while meeting many individuals who also serve as volunteer leaders
- 2 ½ days of educational session for *every member of every estate planning council* with national and multi-disciplinary continuing education credit available

What's New?

- Hotel registration is [OPEN!](#) Reserve your overnight accommodations early.
- Conference registration will open in a few weeks. Be one of the first to register and take advantage of the early rate.

[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).

June Webinars

Building Blocks of Blockchain: Planning with Bitcoin & Cryptocurrency with Abigail Earthman, JD, LL.M.

June 9, 2022 @ 3:00 pm ET

Cryptocurrency has created a lot of buzz – both hype and skepticism. Although cryptocurrency has been in existence since 2008, it is a cutting-edge issue in estate planning. Due to its technological, digital nature, cryptocurrency presents interesting and uncertain tax and practical considerations in planning with this special type of asset. This presentation will provide background on blockchain, the technology underlying cryptocurrencies, and the evolution of cryptocurrencies, such as Bitcoin, in an attempt to demystify the technical features and mechanics of both blockchain and cryptocurrencies, which generally are misunderstood. [REGISTER HERE](#)

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Reviewing the Research on Attitudes & Psychology around Retirement with Jamie Hopkins, JD, MBA, CFP®, LLM, CLU®, ChFC®, RICP®

June 28, 2022 @ 3:00 pm ET

This complimentary webinar is being co-hosted with the Society of Financial Service Professionals
Behavioral finance is still in its infancy, but the way behavioral finance applies to the even more challenging distribution phase of life has almost been unexplored. There are significant lessons to be learned from the way people make decisions in life that can be applied to create a more confident and successful client by simplifying their retirement income decisions. This program will address common misconceptions and assumptions that often prevent clients from building robust and flexible retirement plans. Attendees will then learn how to determine the approach that fits their clients' retirement goals and behaviors. [REGISTER HERE](#)

> 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](#).



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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[General Group](#)

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