

August 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

- Why Should Your Council Attend the Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders?

QUICK CLICKS

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

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]**



Why Should Your Council Attend the Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Estate Planning Council Leaders?

It's the best way to get to know other council leaders, to hear what is working for them, and to gather new ideas for your Estate Planning Council!

The pre-conference sessions, also known as Council Leadership Day, will take place on Tuesday, November 15, 2022. Sessions begin following breakfast with the first of multiple "[learning pods](#)" (small, topic-based workshops where council leaders share experiences and learn from one another).

Membership, programming, social media, events, diversity – equity – inclusion... we've got you covered!

We'll honor our councils during a luncheon, learning pods continue, and the day will conclude with additional sharing sessions by council size and an opening reception. The day will feature ample time for council leaders to get to know one another and to discuss the ideas and concepts that are working in today's environment.

Register this week for the early bird discount!





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Who should attend?

The day is for volunteer leaders and staff executives of estate planning councils affiliated with NAEPC. NAEPC recommends sending at least one officer at the vice-president level or below and the council's executive.

Council Executive / Administrator (paid staff) attendance at Tuesday's Pre-Conference Sessions is encouraged and the registration fee is waived to allow them to do so. For this special group of individuals who are the most constant presence within your council, we also offer time with the NAEPC Webmaster, a private dinner on Tuesday evening with the national office team, and a half-day development session on Wednesday morning.

Learn more about the conference and register at www.NAEPC.org/conference.

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!

> [See the Full Schedule of Events](#)

The Annual Conference provides:

- 2 ½ days of educational session for *every member of every estate planning council* with national and multi-disciplinary continuing education credit
- 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

4 Easy Ways Your Council Can Be Involved

- 1) Invite your members to attend!
- 2) Host a "council night out" during the program where the members of your council get together for drinks or dinner.
- 3) Share the list of sponsors & exhibitors with your council's members. These firms are excellent resources.
- 4) Send at least one council leader and the council administrator / staff executive to the pre-conference sessions.

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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).

Next Webinar

Spousal Trusts: Opportunities and Pitfalls with Matthew G. Brown, Esq.

Wednesday, September 14, 2022 from 3:00 pm ET - 4:00 pm ET

The increased estate and gift tax exemption amount (now \$12,060,000 per person) has radically expanded wealth transfer and income tax planning options. But what first appears simple quickly becomes complex. Clients may be tempted to overutilize the expanded exemption amount. Perhaps they consider making large gifts to trusts for the benefit of children, assuming those children will “play ball” should Mom & Dad ever need the money back. Or maybe they read about so-called Spousal Life Access Trusts (SLATs) that eliminate the pain of gifting. Gifts to irrevocable trusts can be powerful, but there are many traps for the unwary that may frustrate wealth transfer goals, transforming a “simple” plan into a disaster. This presentation will cover select estate tax and income tax considerations for inter vivos trusts created for the benefit of a spouse, focusing on spotting key opportunities while noting the pitfalls that often go unnoticed.

Matt Brown is a partner with the Orange County, California law firm of Brown & Streza LLP. Matt heads the firm’s Tax, Trusts, & Estates Group and its Ultra-High-Net-Worth subgroup. He represents business owners and philanthropists in personal planning, business succession planning, and charitable planning. Matt is a Fellow of the American College of Trust and Estate Counsel (ACTEC) and a former adjunct professor of law at University of California, Irvine School of Law. [LEARN MORE & REGISTER](#)

> 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](#)

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