

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION



HomePaySM

Provided by Breedlove

LAWPAY[®]

CREDIT CARD PROCESSING

Wealth
Management.com

The digital resource of REP. and TRUSTS & ESTATES

Council Leadership Day 2015



The Star Spangled Banner Lyrics
By Francis Scott Key, 1814



**Oh, say can you see by the dawn's early light
What so proudly we hailed at the twilight's last gleaming?
Whose broad stripes and bright stars thru the perilous fight,
O'er the ramparts we watched were so gallantly streaming?
And the rocket's red glare, the bombs bursting in air,
Gave proof through the night that our flag was still there.
Oh, say does that star-spangled banner yet wave
O'er the land of the free and the home of the brave?**



**Oh! thus be it ever, when freemen shall stand
Between their loved home and the war's desolation!
Blest with victory and peace, may the heav'n rescued land
Praise the Power that hath made and preserved us a nation.
Then conquer we must, when our cause it is just,
And this be our motto: "In God is our trust."
And the star-spangled banner in triumph shall wave
O'er the land of the free and the home of the brave!**

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

Welcome &
Opening Remarks
2015 President

Jordon N. Rosen, CPA, AEP®
Belfint, Lyons & Shuman, CPAs



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION



HomePaySM
Provided by Breedlove

LAWPAY[®]
CREDIT CARD PROCESSING

 Wealth
Management.com
The digital resource of **REP.** and **TRUSTS & ESTATES**

COVENTRY
REDEFINING INSURANCE[®]

With
Appreciation

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION



Lawrence M.
Lehmann, JD, AEP®



Paul S. Viren, CLU®,
ChFC®, AEP®



M. Eileen Dougherty,
CTFA, CFP®, AEP®,
ChFC®



Gregory E. Sellers,
CPA, AEP®

Lehmann Norman &
Marcus LC

PRESIDENT-ELECT

Viren & Associates,
Inc.

TREASURER

Hawthorn - PNC
Family Wealth

SECRETARY

Warren
Averett, LLC

PAST PRESIDENT

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

**S. Mark Alton, CFP®, ChFC®, CLU®, CAP®,
AEP®, MSFS, CPWA®**

The Armory Group at Morgan Stanley Wealth
Management
Syracuse, NY

Director Emeritus

**Hartman Axley, CLU, ChFC, JD, CFP®, MSFS,
RHU, AEP®**

Denver, CO

**Thomas M. Borchert, CLU®, ChFC®, LUTCF,
AEP®, CLTC**

Professional Insurance & Financial Alternatives
Sioux City, IA

Julie A. Buschman, CPA, AEP®

Bessemer Trust Company, N.A.
Dallas, TX

Charles V. Douglas, , JD, CFP®, AEP®

Wachovia Wealth Management
Atlanta, GA

John P. Garniewski, Jr., CPA/PFS, CFP®, AEP®

Wilmington Family Office
Wilmington, DE

Robert P. Goodman, CPA, AEP®, CFP®

U.S. Trust Bank of America Private Wealth
Management
Phoenix, AZ

Christopher P. Jakyma, Esq., CTFA, AEP®

The Private Trust Company
Cleveland, OH

Al W. King, III, JD, LL.M., AEP® (Distinguished)

South Dakota Trust Company, LLC
New York, NY

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

William D. Kirchick, Atty, AEP®

Nutter McClennen & Fish LLP
Boston, MA

Lawrence J. Macklin, JD, CFP®, AEP®

U.S. Trust, Bank of America Private Wealth
Management
Baltimore, MD

**Mary Katherine "Kit" MacNee, CFP®,
CRPC, AEP®**

Morgan Stanley Wealth Management
Pasadena, CA

**Susan P. Rounds, JD, CPA,
LL.M. (taxation), AEP®**

Morgan Stanley Wealth Management
Los Angeles, CA

John C. Scott, CPA/ABV, AEP®

Anders Minkler Huber & Helm LLP
St. Louis, MO

**Jeffrey M. Turner, CFP®, CLU®, ChFC®, MBA,
AEP®**

Capital Financial Group, LCC
Chattanooga, TN

Shane Westhoelter, CLU®, LUTCF, AEP®

Gateway Financial Advisors, Inc.
Dublin, CA



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

PAST PRESIDENTS IN ATTENDANCE

Joanna Averett

Hartman Axley

Kathleen J. Belmonte

Herbert Chasman

Walter Lee Davis, Jr.

Joseph V. Falanga

Dan H. Florence

Gary L. Flotron

Thomas M. Forrest

Michael W. Halloran

Clark B. McCleary

A. Stephen McDaniel

Joanna Reiver

Gregory E. Sellers

Gerald A. Youngs

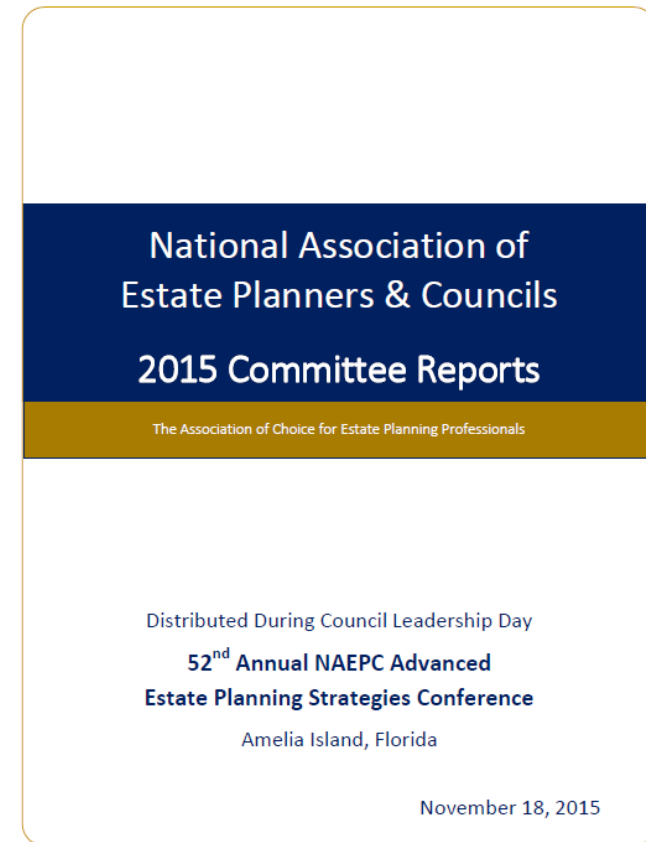
52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

VOLUNTEERS

A list of all volunteers, sorted by committee, can be found within the “2015 Committee Report Packet.”



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

Retiring Board
Member

Gregory E. Sellers, CPA, AEP®



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

In Loving
Memory

Pettus C. Gibbons



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

NOMINATING COMMITTEE

Gregory E. Sellers, Chair

Kathleen J. Belmonte

Christopher P. Jakyma

Lawrence M. Lehmann

Jordon N. Rosen

John J. Scroggin



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

DIRECTORS ·
TERM ENDING DECEMBER 2018

Judith A. Saxe
Category: Attorney

Thomas M. Borchert
Category: CLU[®]

Charles V. Douglas
Category: CFP[®]/ChFC[®]/AEP[®]

Robert P. Goodman
Category: CPA

Julie A. Buschman
Category: Trust Officer



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

2016 EXECUTIVE COMMITTEE



Paul S. Viren, CLU[®],
ChFC[®], AEP[®]

Viren & Associates,
Inc.

PRESIDENT-ELECT



M. Eileen Dougherty,
CTFA, CFP[®], AEP[®],
ChFC[®]

Hawthorn - PNC
Family Wealth

TREASURER



S. Mark Alton, CFP[®],
ChFC[®], CLU[®], CAP[®],
AEP[®], MSFS, CPWA[®]

The Armory Group at
Morgan Stanley
Wealth Management

SECRETARY

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

2016

PRESIDENT

Lawrence M. Lehmann,
JD, AEP[®]



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

IMMEDIATE

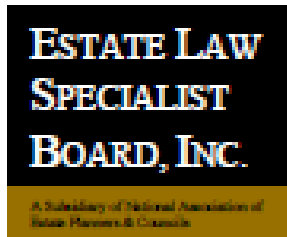
PAST PRESIDENT

Jordon N. Rosen, CPA, AEP®



52nd Annual NAEPC Advanced Estate Planning Strategies Conference EDUCATION • COLLABORATION

NAEPC PROGRAMS & SERVICES •



52nd Annual NAEPC
Advanced Estate Planning
Strategies Conference

with Pre-Conference
Sessions for Council Leaders

EDUCATION • COLLABORATION





NATIONAL ASSOCIATION OF
**Estate Planners
& Councils**

Local Council Web Site Program

Bruce Newburger
NAEPC Webmaster

Robert P. Goodman
Web Committee Chair

Chris Jakyma
Web Committee Chair





New Features for 2015

- All-new Modern Template design options
- New member automated onboarding
- Save and replay communications
- Customization of menu text and pages
- Event RSVP refinements



Modern Template Design Options

- [Desktop demo](#) and [Mobile demo](#)
- Wider layout allows more content
- Home page photo slideshow
- Horizontal menu with drop-downs
- Left column features up to 4 events
- 7 color schemes to choose from
- No loss of content or customization when you switch, or switch back
- Classic template supported through 2016



NATIONAL ASSOCIATION OF
**Estate Planners
& Councils**

Modern Template: Modern Blue

www.test-it.council.naepc.org/events

CITIZENS-UNION
Since 1851 SAVINGS BANK

EBPC ESTATE PLANNING COUNCIL OF THE MIDWEST CITY MEMBERS LOGIN

HOME EVENTS ABOUT DIRECTORY MEMBERSHIP **CONTACT**

Contact Us

UPCOMING EVENTS

NEXT MEETING:



December 1, 2015
Monthly Luncheon
Bruce Newburger
[See Event Details](#)

December 15, 2015
Haoopy Hour

Event Calendar

November 18, 2015	NATIONAL EVENT: 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders - November 18th - 20th, 2015
December 1, 2015	Monthly Luncheon
December 9, 2015	NATIONAL EVENT: NAEPC Webinar: Estate and Asset Protection Planning for Retirement Benefits
December 15, 2015	Haoopy Hour
February 1, 2016	Annual Goldenzweig Lecture

[View Past Events](#)

www.test-it.council.naepc.org/council/contact



Modern Template: Sunrise

www.test-it.council.naepc.org/events

SYNOVUS

EBPC ESTATE PLANNING COUNCIL OF THE MIDWEST CITY MEMBERS LOGIN

HOME EVENTS ABOUT DIRECTORY MEMBERSHIP **CONTACT**

Contact Us

UPCOMING EVENTS

NEXT MEETING:

December 1, 2015
Monthly Luncheon
Bruce Newburger
[See Event Details](#)

December 15, 2015
Haoopy Hour
Sarah

Event Calendar

November 18, 2015	NATIONAL EVENT: 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders - November 18th - 20th, 2015
December 1, 2015	Monthly Luncheon
December 9, 2015	NATIONAL EVENT: NAEPC Webinar: Estate and Asset Protection Planning for Retirement Benefits
December 15, 2015	Haoopy Hour
February 1, 2016	Annual Goldenzweig Lecture

[View Past Events](#)

www.test-it.council.naepc.org/council/contact



NATIONAL ASSOCIATION OF
**Estate Planners
& Councils**

Modern Template: Deep Navy

Google Calendar - Nov 7 - x | General Settings | NAEP | Event Calendar - Estate Pl - x

www.test-it.council.naepc.org/events

Bookmarks | Google Calendar | VerticalResponse | NAEP Bitbucket | Webmail

CITIZENS-UNION
Since 1851 SAVINGS BANK

EBPC ESTATE PLANNING COUNCIL OF THE MIDWEST CITY MEMBERS LOGIN

HOME EVENTS ABOUT DIRECTORY MEMBERSHIP **CONTACT**

Facebook LinkedIn Twitter RSS YouTube

CONTACT Us

UPCOMING EVENTS

NEXT MEETING:



December 1, 2015
Monthly Luncheon
Bruce Newburger
[See Event Details](#)

December 15, 2015
Haoopy Hour

Event Calendar

November 18, 2015	NATIONAL EVENT: 52nd Annual NAEP Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders - November 18th - 20th, 2015
December 1, 2015	Monthly Luncheon
December 9, 2015	NATIONAL EVENT: NAEP Webinar: Estate and Asset Protection Planning for Retirement Benefits
December 15, 2015	Haoopy Hour
February 1, 2016	Annual Goldenzweig Lecture

[View Past Events](#)

www.test-it.council.naepc.org/council/contact



NATIONAL ASSOCIATION OF
**Estate Planners
& Councils**

Modern Template: Desert

The screenshot shows a web browser window displaying the website www.test-it.council.naepc.org/events. The page features a green header with the SYNOVUS logo. Below the header is the EBPCC logo and the text "ESTATE PLANNING COUNCIL OF THE MIDWEST CITY". A "MEMBERS LOGIN" button is located in the top right corner. The navigation menu includes "HOME", "EVENTS", "ABOUT", "DIRECTORY", "MEMBERSHIP", and "CONTACT". The "CONTACT" menu item is highlighted, and a "Contact Us" button is visible below it. Social media icons for Facebook, LinkedIn, Twitter, RSS, and YouTube are also present.

UPCOMING EVENTS

NEXT MEETING:



December 1, 2015
Monthly Luncheon
Bruce Newburger
[See Event Details](#)

December 15, 2015
Haoopy Hour
Sarah
[See Event Details](#)

Event Calendar

November 18, 2015	NATIONAL EVENT: 52nd Annual NAEPC Advanced Estate Planning Strategies Conference with pre-conference sessions for Estate Planning Council Leaders - November 18th - 20th, 2015
December 1, 2015	Monthly Luncheon
December 9, 2015	NATIONAL EVENT: NAEPC Webinar: Estate and Asset Protection Planning for Retirement Benefits
December 15, 2015	Haoopy Hour
February 1, 2016	Annual Goldenzweig Lecture
	View Past Events



New Member Automated Onboarding

- Interactive member application feeds entries admins can view online.
- Applicants become **Prospective** members
- Level 3+ admins can Approve or Deny
- Approved members get a welcome message with and invitation to pay and to flesh out their directory listing
- Approved and paid member data flows into directory of **Active** members



New Member Automated Onboarding

Browser tabs: Google Calendar - Nov 7, Membership Applications, Estate Planning Council of the Midwest

Address bar: <https://admin.naepc.org/membershipForms#applications>

Bookmarks: Google Calendar, VerticalResponse, NAEPCC Bitbucket, Webmail

Page Title: Estate Planning Council of the Midwest City Admin

Logged in as: test-it Logout

MEMBER FUNCTIONS	Date	Name	Status	Application Details	Payment Details
Members	09/12/15	Walter Newgrove	Completed on 09/12/15	Application Details	Payment Details
Member Applications	09/11/15	test1 test	Completed on 09/11/15	Application Details	Payment Details
Member Renewal	09/11/15	Ludwig Newburger	Approved on 09/11/15	Application Details	
Member Benefits	09/10/15	Walter Newland	Completed on 09/10/15	Application Details	Payment Details
Settings & Export	09/10/15	Walter Newman	Completed on 09/10/15	Application Details	Payment Details
SPONSORS & SERVICES	08/28/15	John Troy	Awaiting Approval	Application Details	Approve Reject
Services Directory	08/17/15	Elsie Newton	Approved on 08/17/15	Application Details	
Sponsors	08/17/15	Walter Newton	Completed on 08/17/15	Application Details	Payment Details
LINKS & LIBRARY	08/17/15	Elmer Newburger	Completed on 08/17/15	Application Details	Payment Details
Links					
Document Library					
Photo Galleries					
View Website					
User Manual					



Save and Replay Communications

- You can save a draft of a communication and complete it later
- You can easily duplicate, edit and resend a previous message
- New formatting option adds header with logo and council name
- Phasing out outbound fax support by June 20, 2016



Customization of Menu Text and Pages

- Change the name/title of any page and the menu changes
- Special Projects new page for any use
- Suppress these pages:
 - Sponsors
 - Committees
 - About Us
 - Past Presidents
 - Sponsors



Event RSVP Refinements (Level 3+)

- You can write questions for each attendee, as pick-one or pick-many
 - Ideal for meal choice or surveying
- You can require full address of every attendee, for CE credit or other uses
- Members are warned about duplicate RSVPs
- Members can see who else is attending



Other Enhancements

- Add and sort leadership titles
- Export or print member renewals
- New Communications Group: Non-Renewed Active Members (last 6 months)
- Member Directory profiles now include Social Links, License Numbers and vCard Downloads



Program Levels

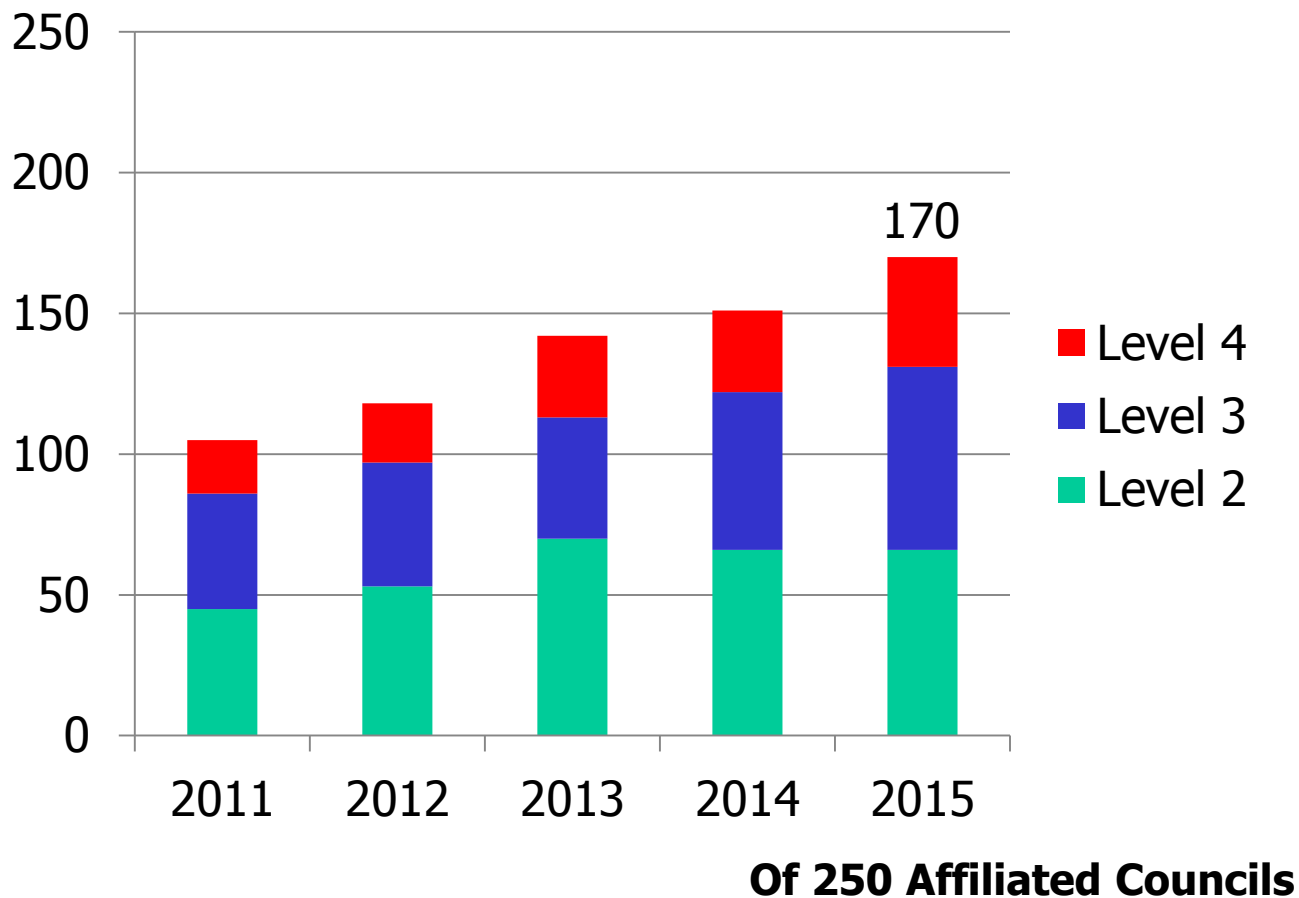
- Options for council administrators:
 - Link to external site
 - Level 1: Directory listing on NAEPC.org
 - Level 2: Standard Site (\$800/year)
 - Level 3: Deluxe Site (\$1,200/year)
 - Level 4: w/Pay. Processing (\$1,600/yr)

- **2015-16 Promotion:** 50% off first-year fee for new site or upgrade costs.



Participating Councils

NATIONAL ASSOCIATION OF
**Estate Planners
& Councils**





Web Site Support Contacts



- First contact is NAEPC staff:
councilservices@naepc.org
 - Meet **Sarah G. Butterfield**
- You may hear back from Bruce Newburger:
webmaster@naepc.org
- Council admin session later this morning
- Bruce available for appointments all day Wednesday and first half of Thursday

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

Walter Lee Davis, Jr.
Leonard H. Neiman

Council of Excellence Award

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

5 STAR COUNCILS

Small: Greater New Jersey Estate Planning Council

Medium: Central Arizona Estate Planning Council

Estate Planning Council of Central New York

Estate Planning Council of Eastern New York

Nassau County Estate Planning Council

New Orleans Estate Planning Council

ExLarge: Chicago Estate Planning Council

Estate Planning Council of Cleveland



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

COUNCIL OF EXCELLENCE RECIPIENTS

ExSmall: Estate Planning Council of Riverside County

Small: Estate Planning Council of Bergen County, Inc.

Medium: Estate Planning Council of Chattanooga

Large: Baltimore Estate Planning Council

ExLarge: Boston Estate Planning Council



52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION



“SHAKING THE TREES” PRESENTATION

10:30 AM – 12:00 PM

Please pick up table assignment
when entering the room after
break.

52nd Annual NAEPC

Advanced Estate Planning Strategies Conference

EDUCATION · COLLABORATION

