

Welcome to the
48th Annual Conference



National Association
of Estate Planners &
Councils

& The NAEPC Education Foundation

*The Association of
Choice for
Estate Planning
Professionals*

COUNCIL
LEADERSHIP
DAY



National Association
of Estate Planners &
Councils

President
Joseph V. Falanga
CPA, AEP[®], TEP

Welcome
&
Opening Remarks





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!**



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of Estate Planners &
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Affiliated Local Estate Planning Councils with a Representative in Attendance

**Anchorage Estate Planning Council
Atlanta Estate Planning Council
Baltimore Estate Planning Council
Bergen County Estate Planning Council
Bluegrass Estate Planning Council
Boise Estate Planning Council
Boston Estate Planning Council
Boulder County Estate Planning Council
Bristol County Estate Planning Council
Bucks County Estate Planning Council
Central Arizona Estate Planning Council
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Chicago Estate Planning Council
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**Delaware Estate Planning Council
Denver Estate Planning Council
Eastern Illinois Estate Planning Council
Essex County Estate Planning Council
Estate Planning Council of
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Estate Planning Council of Cleveland
Estate Planning Council of East Bay
Estate Planning Council of Greater Miami
Estate Planning Council of Marion County
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**Estate Planning Council of Northern
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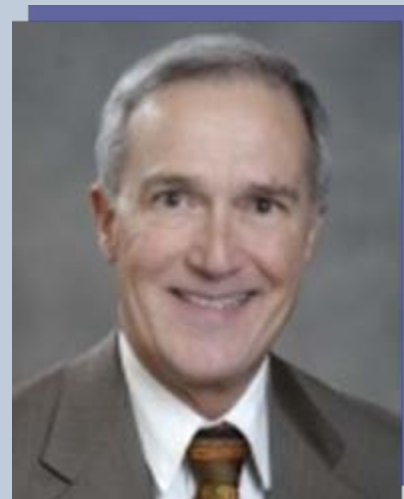
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LAET Inducts “Pro Bono Attorney Hall of Fame”

Legal Aid of East Tennessee (LAET) has named eight Chattanooga area lawyers to its inaugural *Pro Bono Attorney Hall of Fame*, chosen based on their long-term commitment to pro bono representation, increasing access to justice, and support of LAET. They are:

- **T. Maxfield Bahner** of Chambliss, Bahner & Stophel
- **Bruce C. Bailey** of Chambliss, Bahner & Stophel
- **William C. Carriger** of Chambliss, Bahner & Stophel
- **Thomas A. Caldwell** of Baker, Donelson, Bearman, Caldwell & Berkowitz
- **Charles W. "Buz" Dooley** of Leitner, Williams, Dooley & Napolitan
- **Marcia Meredith Eason** of Miller & Martin
- **Richard R. Ruth Jr.**
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"We are privileged to have so many lawyers in East Tennessee committed to giving back to the community," said Charlie McDaniel, attorney at law and pro bono director for LAET.



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One Appointment to a Term Ending December 2012

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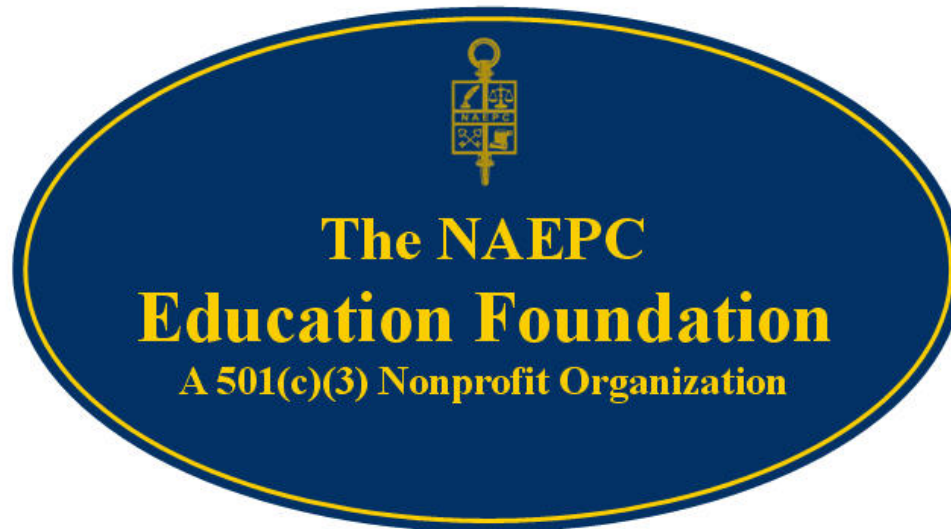
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The NAEPC Education Foundation

Your 501(c)(3) at Work!!!



Improving financial awareness & financial literacy™

A Financially Green Organization™

www.NAEPC.org

www.EstatePlanningAnswers.org

The NAEPC Education Foundation Mission

- To provide the public with financial awareness programs & improve financial literacy
- To educate the public regarding the benefits of the multi-disciplinary team concept of estate & financial planning as espoused by the National Association of Estate Planners & Councils
- To develop educational programs regarding estate & financial planning for financial professionals
- To develop & promote a community outreach program for the general public
- To hold educational conferences, seminars, forums, & meetings regarding estate & financial planning

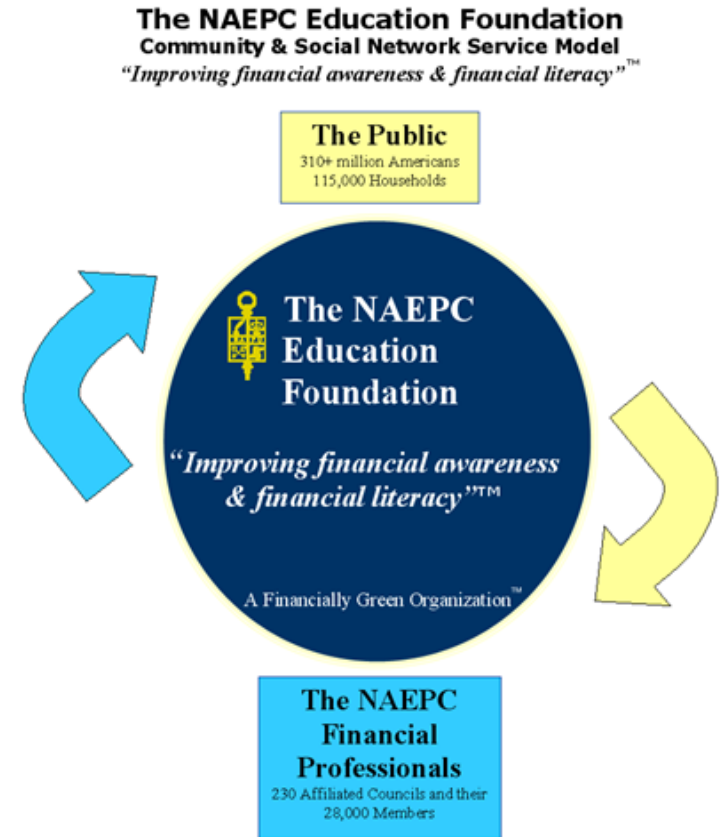
www.NAEPC.org

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The NAEPC Education Foundation

- Is uniquely positioned to both understand & serve
 - the public
 - wealth planning professionals

Helping to make this a better world...



www.NAEPC.org

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One Big Challenge

Improving Financial Awareness & Literacy

- **Estate planning is an element of financial planning**
 - 100 million Americans don't have a current estate plan
- **Half of Americans are unfamiliar with retirement tools**
- **Without a proper & well thought out estate & financial plans people waste big money and often ruin their financial futures**
- **85% of Americans over 65 are totally dependent on Social Security (EBRI-June 2010)**



www.NAEP.org

www.EstatePlanningAnswers.org

Help Us by Being Part of the Solution

- **Goals**

- Alert, educate, motivate & assist the American public to cost effectively get & keep their estate & financial plans up-to-date

- **Touch every American at least twice annually**

- High quality educational content & tools
- Our public estate & financial planning web portal, seminars, programs, media, & relationships

www.NAEP.org

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2011 – 2012 Projects & Programs

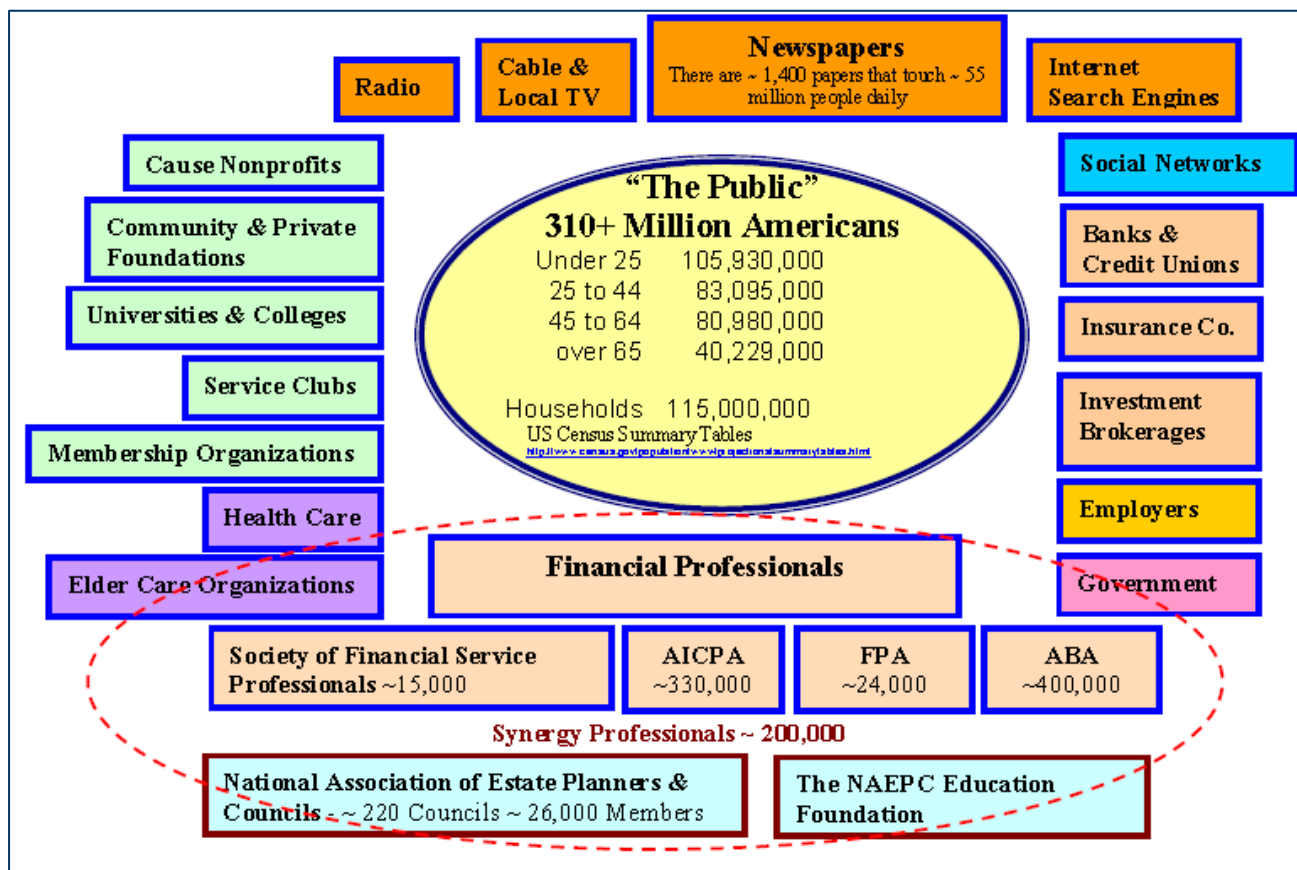
- **Promote financial awareness & improve financial literacy through**
 - National Estate Planning Awareness Week (October)
 - Financial Literacy Month (April)
 - Public & Professional Financial Portals
 - The launching of The NAEPC Education Foundation Publishing Division
 - To facilitate & hold educational conferences, seminars, forums, webinars and meetings regarding estate and financial planning for professionals and the public
 - Fund nationwide scholarships to advance the wealth planning professions

www.NAEPC.org

www.EstatePlanningAnswers.org

The NAEPC Education Foundation

Community & Social Network Exposure Model



www.NAEPC.org

www.EstatePlanningAnswers.org

Our Media Blitz

During National Estate Planning Awareness Week



www.NAEP.org

www.EstatePlanningAnswers.org

Public Financial Portal

The screenshot shows the homepage of the Estate Planning Answers website. At the top, it features the logo for 'Estate Planning Answers' and the NAEPFC (National Association of Estate Planners & Councils) logo. Below the header is a navigation menu with links for Home, Estate Planning & Administration, Financial Planning, Life Events, Full Content Library, and Glossary of Financial Terms. A search bar is located on the left, and a 'Resources' link is on the right. The main content area includes a 'Welcome to Estate Planning Answers' message, a 'Find an Accredited Estate Planner' section with a zip code search, and a 'Thoughts for the Day' quote. The 'Featured Articles' section lists three articles: 'Alert: Third Week in October (October 18 – 24, 2015) is National Estate Planning Awareness Week', 'Is it time to get your estate planning house in order?', and 'Working with an estate planning attorney'. A word cloud is also present, with terms like 'Budget', 'marriage', 'paperwork', and 'retirement' visible. The footer contains copyright information for 2010 and a disclaimer.

www.NAEPFC.org

www.EstatePlanningAnswers.org

Public Financial Portal – Continued

Find an AEP® or find councils easily

Estate Planning Answers a service of THE NAEPC FOUNDATION NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

Home About Glossary of Financial Terms Terms and Use Site Map Magnify Font Size: A A Search Site...

Financial Wellness Estate Planning Life Events Life Stages Retirement Videos Elder Law

Trusts

RSS feed for this section

Trust Distribution Checklist

There are lots of ways you can have your trust distribute money to your beneficiaries. Here is a checklist of some of the jargon, considerations, and approaches involved in trust distribution. Too often people view these critical and personal decisions as mere "boilerplate". Doing so may well jeopardize your intended goals for setting up a [...]

[Read more](#)

Categories: Trusts
Tags: trust, Trusts

Trust and Estate Miscellaneous Deductions

This one sounds tedious, but it's pretty significant for many wealthy taxpayers and those who advise them. If you as an individual claim certain miscellaneous itemized deductions you have to first reduce them by 2% of your adjusted gross income ("AGI"). IRC Sec. 67(a). Your adjusted gross income is the total of all your income, [...]

[Read more](#)

Categories: Estate Planning, Trusts
Tags: Estate Planning, trust, Trusts

NATIONAL ASSOCIATION OF Estate Planners & Councils
The Association of Choice for Estate Planning Professionals

FOR PROFESSIONALS FOR COUNCILS FOR THE PUBLIC

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- CLU (Chartered Life Underwriter)
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Plan now for [National Estate Planning Awareness Week](#)
October 17-23, 2011

NAEPC 48th Annual Conference
Nov 16-18
2011
San Antonio Texas

Journal of Estate & Tax Planning
[See Current Issue](#)

[Frequently Asked Questions](#)
for estate planners and councils

Public Financial Portal – Continued

The screenshot displays the 'Estate Planning Answers' website. The header includes the site name and logo for the National Association of Estate Planners & Councils (NAEPC). Navigation tabs include Home, About, Glossary of Financial Terms, Terms and Use, Site Map, Mobile Font Size, and a search bar. A main menu lists categories: Financial Wellness, Estate Planning, Life Events, Life Stages, Retirement, Values, and Elder Law. The main content area features a 'Find an Accredited Estate Planner' search box, a 'Thought for the Day' quote, and a 'Featured Articles' section. One featured article is titled 'The 2010 Tax Relief Act was signed December 17, 2010'. Below this, there are more articles such as 'Alert: Third Week in October (Oct 2011) is National Estate Planning Week' and 'Budgeting: Let your goals fuel your future'. A 'Resource Center' section lists various financial websites. The footer contains copyright information for 2011.

Timely content, great resource links, downloadable worksheets, forward to your social networks, ...

RESULTS

If you practiced all these money-saving techniques, you could save yourself more than \$1,000 per month.

If you're 37 and saved this amount every month until age 65 while earning 8 percent on your money, you could have an additional \$1.2 million! Not bad for playing the "Cost-Saving Money-Making Game."

DOWNLOAD YOUR FREE COPY OF THE COST-CUTTING MONEY SAVING GAME HERE: The Cost-Cutting Money Saving Game

RESOURCE CENTER

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- www.smartaboutmoney.org
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- www.financialPARTNER.com
- www.couponcity.com
- www.etsy.com
- www.faxact.com/reference/library_index.asp
- www.invest.com/insurance_quotes.html

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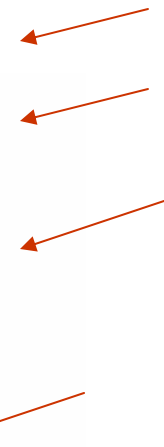
Last edited Sep 18, 2010

Categories: Budgeting
Tags: Budgeting, marketing, expenses, advice, website

This website is brought to you by The NAEPC Foundation, working in partnership with the National Association of Estate Planners & Councils. Formed in 2005, the NAEPC Foundation provides information about the multi-disciplinary approach to estate planning for the public and holds educational conferences, seminars, forums, and meetings for practitioners. The National Association of Estate Planners & Councils is composed of 220+ estate planning councils and their 20,000 members across the country and administers the Accredited Estate Planner designation to qualified professionals that support the team concept of estate planning.

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Launching The NAEPC Education Foundation Publishing Division


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Key Benefits to the Public & Professionals

- **National Estate Planning Awareness Week & Financial Literacy Month**
 - Organized strategic contact plan
 - Community efforts
- **“Go To” Public Financial Portal**
 - Friendly, motivational, unbiased, up-to-date, empowers the public
- **Launching The NAEPC Education Foundation Publishing Division**
 - Cost effectively bring content and tools to the public & professionals
- **Educational Programs**
 - Helps create financial awareness amongst the professionals & the public

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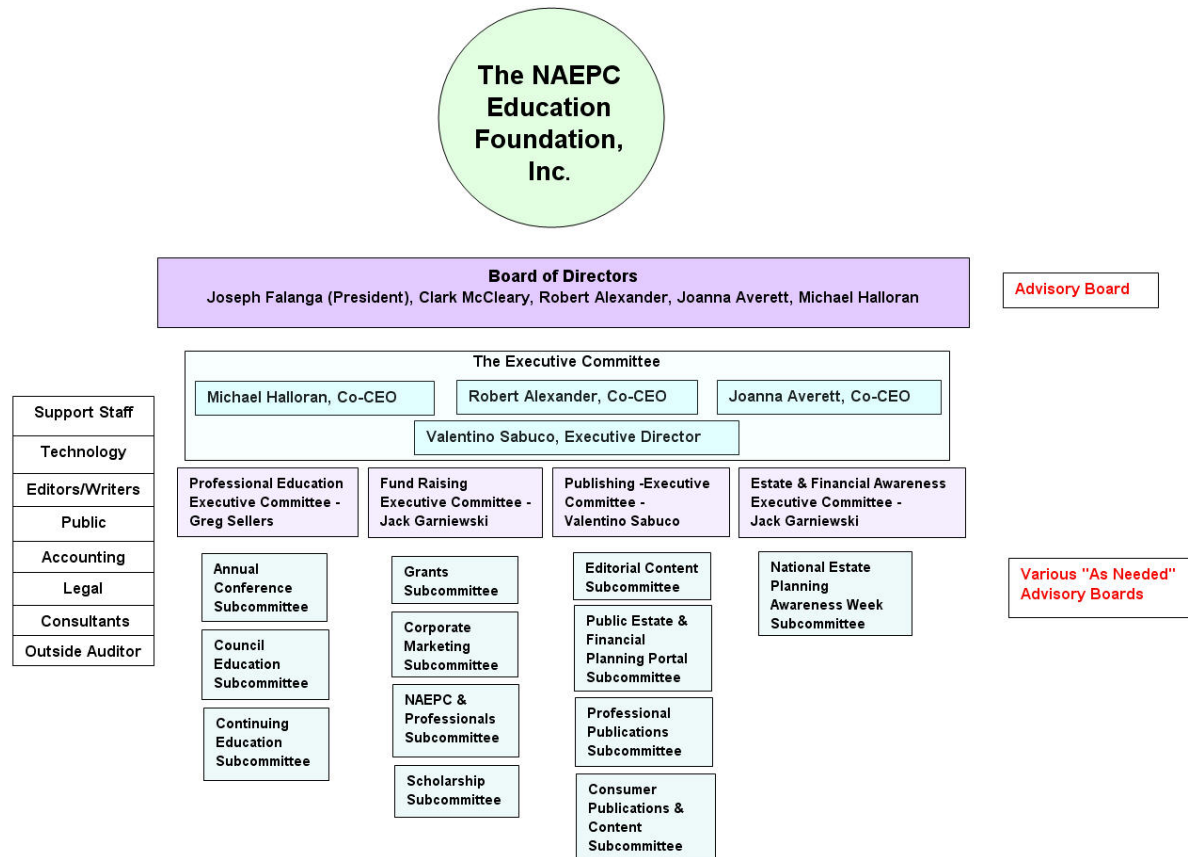
2011-2012 Project Timetable

	Description	Target Completion Date
1	Launching Publishing Programs	December 1 st
2	Financial Literacy Month	April 1 st
3	Public Financial Portal	April 1 st
4	Professional Financial Portal	July 1 st
5	National Estate Planning Awareness Week	3 rd Week in October
6	Scholarships	Ongoing

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Our Organizational Structure



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www.EstatePlanningAnswers.org

Leadership & Key Personnel

Our 2011 Officers

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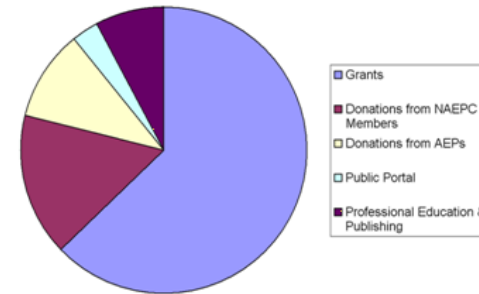
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The NAEPC Education Foundation

2011-12 Fund Raising & Operating Goals

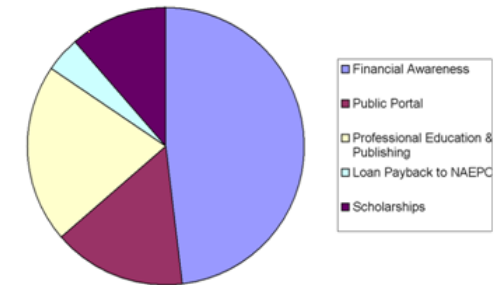
Receipts

Grants	\$1,000,000
Donations from NAEPC Members	260,000
Donations from AEPs	160,000
Public Portal	50,000
Professional Education & Publishing	125,000
Total Receipts	\$1,595,000



Expenditures

Financial Awareness	\$465,000
Public Portal	150,000
Professional Education & Publishing	200,000
Loan Payback to NAEPC	40,000
Scholarships	110,000
Total Expenditures	\$965,000 ⁽¹⁾



Cash Flow (Deficit)

\$630,000

(1) Administrative expenses are difficult to estimate in advance. The NAEPC Education Foundation is committed to manage general administrative expenses in a manner that is consistent with acceptable operating standards for similar educational foundations.

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North Suncoast Estate Planning Council
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2011 National Estate Planning Awareness Week

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wishes to thank

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for their efforts to make National Estate Planning
Awareness Week 2011 a tremendous success

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● Through the Synergy Summit

- American Association of Attorney - CPAs
- American Bar Association - Real Property, Trust & Estate Law
- American Bar Association - Tax Section (Estate & Gift Tax Committee)
- American Institute of Certified Public Accountants
- Society of Financial Service Professionals
- National Academy of Elder Law Attorneys
- Partnership for Philanthropic Planning
- ACTEC

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Thanks for your Consideration!

If you would like additional information on how you can make a difference

Please contact

Robert G. Alexander - 414.476.5020
bob@alexander-klemmer.com

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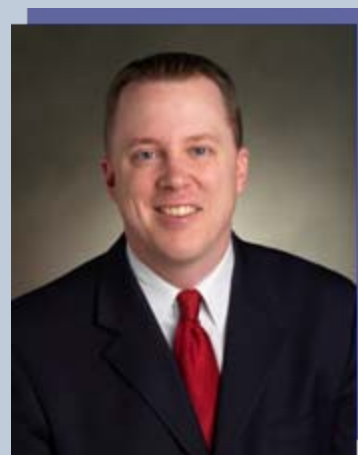
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*Website Chair:
Robert P. Goodman,
CPA, AEP[®]*



*Technology Chair:
Christopher M. Brown,
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NAEPC Webmaster

Bruce Newburger





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NAEPC Webmaster

Group Sessions with
Web Master:
*Sign up at the
registration desk*

10:25 - 10:50am

12:00 noon - 12:30pm

12:30 - 1:00pm

2:45 - 3:15pm



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Website Discount Program

WEBSITE SPECIAL

If your council does not currently have a website through the NAEPC & decides to become a first time subscriber to one of the following; Level II, Level III or Level IV, your council will receive the site at a 50% reduced rate for the first year.

<u>Website Level</u>	<u>Regular Price</u>	<u>Special</u>
Level II	\$800	\$400
Level III	\$1,200	\$600
Level IV	\$1,600	\$800

If your council already does have a website through the NAEPC & decides to upgrade the current site to a Level III or Level IV, your council will receive \$200 off the upgraded website regular price. *

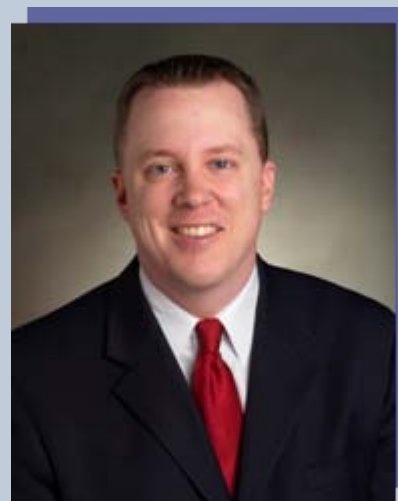
<u>Website Level</u>	<u>Regular Price</u>	<u>Special</u>
Level III	\$1,200	\$1,000
Level IV	\$1,600	\$1,400



National Association
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Social Media Campaign

Chair:
Christopher M. Brown
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Social Media Campaign

Facebook Fan Page / The NAEPC Education Foundation

LinkedIn for NAEPC, NAEPC Council Leaders & Designees

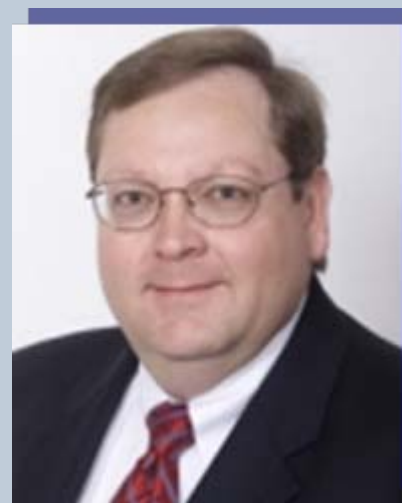
Council Recommendation Statement



National Association
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Chair:
Gregory E. Sellers,
CPA, AEP®

*Accredited Estate
Planner® Designation
Committee*





National Association
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Highlights from 2011

Designation Growing

Acceptance Growing

Ongoing Coursework Review

Social Networks – IShade, LinkedIn

2012 Estate Planning Hall of Fame Entrants Chosen



**National Association
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Councils**

Councils Using the Council Nominated AEP[®] Program in 2011

Boulder County Estate Planning Council

Bristol County Estate Planning Council

Central Arizona Estate Planning Council

Central New York Estate Planning Council

Charlotte Estate Planning Council

Chester County Estate Planning Council

Cincinnati Estate Planning Council

Columbia Estate Planning Council

Delaware Estate Planning Council

Denver Estate Planning Council

Hampton Roads Estate Planning Council

Martin County Estate Planning Council

Nassau County Estate Planning Council

New York City Estate Planning Council

San Diego Estate Planning Council

Spokane Estate Planning Council



National Association
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Boulder County Estate Planning Council Letter

Dear Mr. Sellers:

Thank you for recognizing the Boulder County Estate Planning Council for our participation in the Accredited Estate Planner (AEP) program.

Members of the Boulder County Estate Planning Council (which draws from the greater Boulder County, Colorado region) know the value of the AEP designation. Of our 107 members, 21 are either AEPs or nominated for the year ahead. In our council, AEPs are recognized at the monthly meeting upon receiving the designation.

In my practice, I've found that clients respect that I specialize and have taken the time to stay on the cutting edge of my specialty as an AEP. As the AEP designation gains more recognition from the public nationally, members with the designation are sure to be able to differentiate themselves even more. Not to mention added benefits such as reduced subscription rates to "Trusts & Estates."

Sincerely yours,
Kurt Hofgard, JD, CLU, ChFC, AEP
Vice President/Program Director 2011



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Councils Using the Council Nominated AEP® Program

Councils with 100 or less members – 1 nomination/category

Councils with 101 or more members – 2 nominations/category

Council Verification Takes Place of Professional Reference Letters



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Looking Forward to 2012

Education
Networking
Practice Growth



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Estate Planning Day in a Box
Materials for Affiliated Local Councils



National Association
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Break
10:25 - 10:50am
Foyer

Welcome to the
48th Annual Conference



National Association
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COUNCIL
LEADERSHIP
DAY



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Chair:

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November 7 - 9, 2012

*National Association of Estate
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50th Annual Conference



Las Vegas,
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Cosmopolitan
of Las Vegas

November 20 - 22, 2013



National Association
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Council Relations Committee

Chair:

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Council Relations Committee

Council Relations Committee Purpose

- Assist affiliated local councils in understanding the benefits, programs and services offered by the NAEPC
- Assist unaffiliated local councils in the affiliation process



National Association
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Council Relations Committee

Facts and Figures

- 230+ affiliated local councils
- Approximately 70 prospect councils throughout the United States
- Active and engaged committee members noted within committee report



National Association
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Council Relations Committee

Council Offerings

- **Leimberg (LISI) Service**
 - members receive unlimited access
 - provides financial service professionals fast, frank, and incisive analysis of proposed and recent legislation, regulations, cases, and rulings by experts such as: John McFadden, Lisa Starczweski, Jim Maule and Bob LeClair - LISI is home to a very powerful engine that will help subscribers create customized searches more easily and quickly than ever before possible.
 - your subscription includes up to six newsletters providing analysis of proposed and recent legislation, cases and rulings.
 - offers access to the hundreds of cases, rulings and legislation already reported on - and a database of all of those to be posted in the future. These commentaries are even more useful and instantly accessible through an incredibly powerful search engine that allows you to create custom searches to locate specific topics, references, and citations of particular interest to you.



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Council Relations Committee

Council Offerings

- **Leimberg (LISI) Service *continued***
 - **Other benefits include: Retirement and Roth IRA calculators; Ten-year archive of our monthly FaxNet data service; Section 7520 and other important rate information**
 - **Cost to NAEPC affiliated councils:**
 - To enroll in Jan., Feb., March, or April - \$18/member**
 - To enroll in May, June, July, or Aug., - \$14/member**
 - To enroll in Sept., Oct., Nov., or Dec., - \$24/member ***
- *covers the last 4 months of the year and all of the following year.**

All members of a council must enroll.



National Association
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Council Relations Committee

Council Offerings

- Yearly no-charge speaker program

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Jacksonville, FL

Clark B. McCleary, CLU, ChFC, MSFS, AEP[®] (Distinguished)
Houston, TX



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Council Relations Committee

Council Offerings

- **Midwest Transaction Group Merchant Account Services**
 - Great Rates
 - qualified swiped transactions cost only 1.55% + 20¢.
 - qualified non-swiped transactions cost only 2.25% + 20¢.
 - Incredible Customer Service
 - available 24 hours a day, 7 days a week from people you know and trust – you’ll never get an impersonal call center.
 - Unmatched Experience
 - legal and accounting communities have repeatedly made Midwest Transaction Group their number one processing choice
 - Free PCI Compliance Support
 - specialists will help you comply with the new PCI security standards and meet the related filing requirements, at no cost



National Association
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Council Relations Committee

Other Council Resources

- Sterling Cut Glass
 - Discounted glass and crystal pieces
- PS Awards
 - Discounted plaques, award pieces, novelty items



National Association
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Every Council Campaign

Every Council Campaign

- 1/2 of affiliated local councils participating currently
- Over 17,000 enrolled members learning about benefits available to them directly from NAEPC!



National Association
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Every Council Campaign

Our Commitment to You

- NAEPC News distributed via email six times per year with opt out opportunity
- Hard copy annual conference brochure once per year
- We will never sell contact information or provide it to outside vendors
- Authorization form required to enroll
- Yearly opt-out provided within annual dues notice



National Association
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Chair:

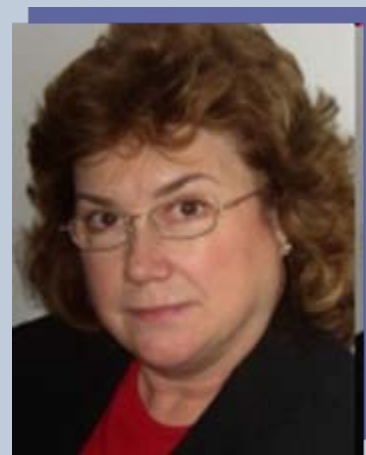
*Cindy D. Causby,
CTFA, AEP[®]*



Member Benefit Programs

Committee Member:

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





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Member Benefit Programs

The ABA Checklist for Family Heirs...

Acquire Direct Marketing

A Parent's Guide to Wills and Trusts...

Advisys

AfterSteps

Amicus Creative Media & Legal Vault

Business Valuation Resources, LLC

CCH, a Wolters Kluwer business

CiviCom

Discuss Directives, LLC / Heart to Hearts Workbook
& Deck of Cards

DocuBank

Estate ++, created by Vaulting Systems International

Estate Planning Smarts by Deborah Jacobs

EstatePlanningBinders.com

Evaluation Services Inc.

Family Business Magazine

*Family Foundation Advisor & Journal
of Taxation of Investments*

Florida Domicile Handbook

Interactive Legal Systems / Wealth Transfer Planning

Klark Proposal Software

Konica / Minolta Business Solutions

LegacyQuest, LLC

Midwest Transaction Group (**it's a member benefit too!**)

My Estate Planning Organizer

Private Wealth Magazine

Robert Keebler's Exclusive IRA Conversion Decision Chart
& Health Care Surtax Chart

Ruby Receptionists

Trusts & Estates

Wealth Management Business



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NAEPC Journal of Estate & Tax Planning

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Third Quarter, 2011

NAEPC Journal of Estate & Tax Planning

Editor's Note: This "dinner menu" summary is designed to help you with the flavor of the article before you read more. If you are interested in the article, click its title to access a copy.

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Planning in the Headwinds of Change

Author: Charles V. Douglas

[List of Conferences](#)

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www.naepc.org/journal



National Association
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Question & Answer Period and Closing Remarks



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Upcoming Activities

Lunch ~ Salons A, B&F

1:00 - 5:00pm Council Breakout Sessions by Size

Small Councils ~ Conference Rooms 1-2

Medium Councils ~ Salon C

Large Councils ~ Salon D

Administrators ~ Conference Room 3

**5:00 - 7:00pm Welcome Reception with Exhibitor
Salons A, B&F**