

April 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

- Robert E. Fox, CLU®, AEP® Volunteer Service Award
- Warning: Spoofing Attempts
- Next Three Events in the Council Leader Education Series  
*Tomorrow, April 22<sup>nd</sup> @ 1:00 pm ET: [Imagining Your Council Post-COVID - Strategies for Sustaining Membership and Engaging Members in New and Different Ways](#)*

### QUICK CLICKS

- [Council of Excellence Application](#) (Due May 13, 2022)
- [A Look Inside NAEPC](#) (PowerPoint Presentation)
- [Board Update Form](#)
- [Join the Council Leader Group on LinkedIn](#)

### 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
- Connect with Us on LinkedIn

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

IN A HURRY?

SCAN FOR **[HOT TOPICS]**

**[HOT TOPIC] Robert E. Fox, CLU®, AEP® Volunteer Service Award**

Deadline for 2022 Nominations: Friday, May 13, 2022

Named in honor of a long-serving volunteer with NAEPC, this new award embodies the spirit of service that Bob Fox held so dear and will be offered yearly on a discretionary basis to an individual or individuals in recognition of exceptional volunteer service to (a) their estate planning council, (b) their local community as identified by the local estate planning council, or (c) to NAEPC itself during the prior calendar year.

Nominations will be accepted from an estate planning council board of directors or from an individual member of the board of directors of an estate planning council, estate planning council staff executive / administrator, NAEPC board member, or a staff member of NAEPC.

Learn more about the award and its criteria [on our website](#).

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### Warning: 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 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 points of contact, such as an email address and website, 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 board to the possibility of this type of scam.
- 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.*

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**Self-Care for Your Estate Planning Council · Next Three Events in the Council Leader Education Series**

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](#)

Executive / Administrator-Only Session

Monday, May 2, 2022 from 12:00 pm ET - 1:00 pm ET

[Learn More & Register](#)

**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!**

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

Confirmed educational session presenters:

- |   |  |
|---|--|
| • April Caudill, JD, CLU®, ChFC®, AEP®                              | • Meghan Gehr Hubbard, JD  |
| • Samuel A. Donaldson, JD, LL.M., AEP®<br>(Distinguished)           | • Marianne M. Jennings, JD   |
| • Ric Edelman   | • Amy K. Kanyuk, JD & Melissa Langa, A.B.,<br>JD, LL.M. (taxation), AEP® |
| • Elizabeth Forspan, JD   | • Raymond C. Odom, JD, CFP®  |
| • Christopher R. Hoyt, JD, AEP®<br>(Distinguished)                  | • Michael A. Perlmutter, JD, CPA, CVA,<br>ABAR                           |
| • Wendy S. Goffe, JD, AEP® (Distinguished)<br>& Kim Kamin, JD, AEP® |  |

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

Hotel registration will open in late April and conference registration is expected to open late May.

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.

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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).

> 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](#).

### New Benefit

#### [Advanced Practice Symposia brought to you by NAIFA and the Society of FSP](#)

NAIFA and the Society of FSP are bringing together thought leaders in the field of advanced financial planning for a half-day of high-impact presentations and discussions regarding working with businesses and organizations in 2022. Attend the Advanced Practice Symposia to learn new ways to approach complex cases and how you can better partner with a variety of industry professionals to expand your offerings and create top-line growth. NAEPC members attend at the NAIFA / Society of FSP member rate.

### 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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