

December 2022 · Year-End Issue

## 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

- Programming Resources
- Checklist for Starting a New Year (for councils with a calendar year-end)
- Six Things to Know about the 60<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

### QUICK CLICKS

- [Join the Council Leader Group on LinkedIn](#)
- [Board Update Form](#)

### IN EVERY ISSUE

- Robert G. Alexander Webinar Series
- Benefits Available to Members of Your Council

### IN A HURRY?

SCAN FOR **[HOT TOPICS]**



### Programming Resources

**[HOT TOPIC]** NAEPC offers programming assistance to councils in multiple ways:

- No-Charge Speaker Program  
This opportunity includes speakers who are either current board members, past board members, or past presidents of NAEPC that offer both a technical presentation and a review of NAEPC benefits. > [Learn More](#)
- Online Speaker Library  
This option offers presenters who have expressed interest in speaking to your affiliated local council. > [Learn More](#)
- Robert G. Alexander Webinar Series  
Available to councils for live or on-demand group showings, this program allows your council to choose one, four, or an entire year of webinars to show to members gathered in person or virtually. > [Learn More](#)
- Input From Other Councils  
See what other councils are doing by searching the calendar of council events. > [Learn More & See Upcoming and Past Events](#)

**Our New Address:** 2001 Crocker Rd., Ste. 510  
Westlake, OH 44145  
[councilservices@naepc.org](mailto:councilservices@naepc.org) · 866-226-2224

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### Checklist for Starting the New Year

Is your council changing officers on January 1<sup>st</sup>? View two handy documents provided by NAEPC:

- [Checklist for Starting Your Council's New Year](#)
- [Position-Specific Descriptions & Responsibilities](#)

### Six Things to Know about the 60<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference November 12 - 16, 2023



#### [Add the Conference to Your Calendar](#)

1. A new schedule means less time away from your office.
2. Educational sessions are crafted for every member of your council, from newer professionals to the most seasoned. **[HOT TOPIC]**
3. Exceptional presenters will address multi-disciplinary topics that are appropriate for every member of your estate planning council, ***but we need your help to spread the word about the event.*** **[HOT TOPIC]**
4. The conference includes meetings about council operations just for the leaders of your EPC. Called “learning pods,” these *post-conference* topic-based workshops address subjects that are most important to the success of a council / membership association in today’s environment.
5. We’ll be returning to sunny [Fort Lauderdale](#) and [Marriott Harbor Beach](#) where a beachfront location with modern and plentiful amenities provides the perfect marriage of conference + relaxation.
6. Attendees will have an opportunity to cultivate important new relationships while collaborating on cutting edge ideas and trends.

#### [SEE THE LATEST CONFERENCE UPDATES ON OUR WEBSITE](#)

### 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 in a single in person or virtual location.

#### *First Two 2023 Webinars:*

##### **Estate Planning Paralysis: Getting Your Clients to Act in 2023**

Justin T. Miller, JD, LL.M. (taxation), CFP®, AEP®

Wednesday, January 18, 2023 · 3:00 pm ET - 4:00 pm ET

When evaluating tax, estate, and philanthropic planning advice, many clients find themselves paralyzed from taking any action. How do you determine the optimal solutions to address your clients’ needs, communicate sophisticated planning strategies in a manner that is easy to understand, and motivate a client to implement those strategies? This webinar will provide concrete

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methods for you to help clients move beyond anxiety and confusion to act - even in an environment of ongoing market volatility and economic uncertainty. > [Learn More](#)

### The IRS Dirty Dozen

Caroline D. Ciraolo and John D. (Don) Fort

Wednesday, February 8, 2023 · 3:00 pm ET - 4:00 pm ET

> [Learn More](#)

> 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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(866) 226-2224 - fax (216) 696-2582  
[admin@naepc.org](mailto:admin@naepc.org)

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[Council Leader Group](#) (private)

[General Group](#)

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

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