



2024 COUNCIL LEADERSHIP CONFERENCE NOTES

Social Media Action Plan (2 Sessions)

Monique Lavender Greenberg

Who uses social media?

- A few councils report using some sort of social media.
- Councils reported using it to make sure they don't go stale. Used to bring some life into the council. Marketing.
- Want it to be a marketing tool / member engagement. Use it as a resource. Post on private LinkedIn group and other members might step up. LinkedIn group - some people post, but there's not a lot of engagement. Management company posts things for us, but we'd like to be more interactive.
- Chicago uses LinkedIn. New members, marketing new events, etc. Group forum for members only. Started last month using a QR code on tent cards - picked up membership that way.
- People may wonder why to post on Instagram / Facebook, but everyone uses a different format of communication. Need to use all formats in order to reach more people.
- Can use Hootsuite to create one post that will post to multiple platforms. Free version or paid.

What are people posting?

- Blurb about upcoming events. Monthly newsletter, LinkedIn posts. Tagging helps with cross-promotion. Posting on both private and public pages. Request board members to reshare the posts.

How are posts being created?

- Canva. Can create different templates.
- Text-only posts get less activity/engagement than posts with photos. Visual engagement is important.
- Ask attendees permission to use their image when they sign up to attend events, so you can post pictures.
- Social media chair posts.
- Viper - send away content and someone creates posts. It's cheap.
- Suggested that admin be the owner of the LinkedIn group, due to board turnover
- Suggested that NAEPC create template posts to give to councils, and a sample social media schedule
- Beware of using photos you don't have the right to use. copyright for images taken from the web. Canva stock images can be used in posts. Pexels free stock images site.



- How do you get people to share posts? Put members' images on the posts, then they'll share. Make someone feel special and they'll repost. At all events, one person will take pictures and the person that is in charge of social media can grab the photos to post.
- During one meeting a year, walk people through how to post/re-post on LinkedIn
- Tell the board that it's their obligation to share posts.
- Younger generation of folks do things on social media regularly - foreign to us and need to use social media
- Caution against worrying that efforts are failing with social media in terms of engagement. You can look at the views, etc. Just because people don't engage in social media, doesn't mean it's not seen and that people won't come to events, etc.
- Provide a QR code at meetings - easy way to get people to post.
- Important to have a social media plan.
- Organization controlled email should do the posting.

Most attendees have accounts in LinkedIn, Facebook, Instagram

- LinkedIn closed group with 6 members. Looking to expand that. Looking for recommendations.
- Some people have both a closed and open group.
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Individual page v. company page

- Individual pages show up better in the algorithm than the company page
- Closed groups - general feel like they don't get used or work well; that's not where people are going for collaboration
- Facebook lawyer groups (closed) that work

Goal of social media - engagement of younger members, maintain members, making sure they have that other channel of communication in addition to email

How are you posting? Images, text, etc.

- Posting images. Sometimes personal stories are better. Pictures from last meeting (speaker).
- Having milestones is a good way - acknowledging members (20 year membership, etc.)
 - Member spotlights
 - Tag people (speaker and sponsor)
 - Post photos of events

Who posts?

- Admin does the posting.
- Chair of board is in charge of it.



Posts

- Are there any speakers to have to talk about social media?
- Member spotlights - easy content
- Post before and after events. Posts after the event are great promotion and will increase interest in future attendance.
- Some posting is better than no posting.

Is there any language about privacy, etc. It's a state issue.

What is the benefit of paying for LinkedIn membership? You can see who views your profile. The analytics are available.

You need to go where the people are - maybe post on Facebook, Instagram and LinkedIn so you can reach more people.

QR code available at meeting for them to scan and join your group - so easy to create a QR code
Videos are even better to attract more likes, etc. Reel.

Is NAEPC in a position to help councils with this? It's been discussed to create a few templates to provide to councils.

Crafting Events with Broad Appeal- In Person versus Virtual?

Paul Casperson and Rich Chalifoux

- Hybrid- Too expensive due to AV costs if only a few participate via Zoom
- Councils have transitioned post Covid from Virtual to Hybrid to Only In-Person
- NH Records meetings and uploads them to website afterwards
- Some councils still doing hybrid, but expense is causing them to reconsider

- CLE has seen 30% virtual participation each month, (450 I council) Partnerships with other organizations sell out
- Adding social events has been very successful, focusing on young people
- Experimenting with new locations to increase engagement

- Long Island, 9 meetings per year
- Sponsorships- around \$30,000 in revenue from other organizations



- Check out other council websites for great ideas- dues, events, application, membership requirements, etc.
- “Experiential” programs to include more interests, venues, and activities,
- AEP and Top Golf. Might use jumbotron to project PPT
- Biggest challenge- quality speakers
- Idaho- 60 members, Elevator speech for potential sponsors, logo on website
- Recent topics that are garnering interest- Sam Donaldson
- Natalie Choate,
- Fed Reserve Bank
- Anirban Basu- great speaker
- Mentioned council event schedule on NAEPC website to get speaker/topic ideas
- Lehigh Valley- guests can come to an event for free once a calendar year.
- CE- way to incentivize attendance? Some councils apply for CE for all events
- Are councils offering corporate memberships? Answer seems to be no
- Allow guests? Many do
- Low membership numbers in insurance.
- Get a lot of real estate agents but don’t admit to membership
- Losing CPAs
- Some councils have member discipline limits

Board Engagement + the Board Nomination Process (2 Sessions)

Juan Ros

How has your council and its activities changed post-Covid?

- Time to regroup, change by-laws and change rules for how long a board member can stay
- Push to get younger members
- Group discussed how to recruit more CPAs
 - Network with other associations
 - Read “Recruit the Right Board” and helped recognize certain attributes of members



that could be good leaders; helped develop leadership pool

-Chicago recently created a policy and procedures book on executive committee members and their roles; other councils complained that there is no consistency or job description for incoming members

-Tampa Bay used to have consistent meeting times; post-Covid meeting times and days are not consistent, which may effect attendance because members don't have it on their calendars.

-Cincinnati says inconsistent or varying meeting times/days/events helps bring in more members because it fits their schedule

How do you make sure board members are prepared for their roles?

- Have them serve on committees so they understand more about how the council runs
- Each committee is chaired by a board member; then the board member gets to know the members and can recruit volunteers that have leadership qualities where they'd be good to serve as a board member
- Highlighted free speaker program
- Promoted Social in a Box - \$500 is available to host a gathering to promote and education members on the AEP discipline
- Board member noted that AEP members must be on a council and that motivates people to join the council

How to handle underperforming or disrupting volunteers?

- Find their strengths and move them to the right spot
- Recruit others to nudge them to work harder; be a good role model

Do you have a nominating committee?

- No, small council, are happy to have any volunteers
- Treasurer has to be CPA, this council only has 1 CPA so that board member has had a long tenure and no one else to fill that spot
- Chairs of committees are promoted to the board

Boards' activities changed

- Bolstered communication structure
- Using Cote (?) as an audit tool
- Zoom
- Off boarded less active board members, "low producing"

When are nominating committees convened? Working year round

- Must contain an honorary board member
- Allow past president to attend any board meeting



Prepare the incoming board members for position- policy, procedure, orientation, Ideas-

- 1 year “honorary board member” term
- Competency based board- traits- doer, brainstormer, communication skills
- Quantitative goals for each board member- attendance, you did/didn't do X
- Detail what they need to bring to the table

Board members are liaisons to committees but can't run them

Board Orientation Packet

- Bylaws
- NAEPC relationship

Maintaining must know

Appoint NAEPC Liaison (or for larger council, Liaison committee) to a multi-year position

- AEP
- Council of Excellence

General updates

Serve on the board for a year before you can serve as an officer

Thanking board members for service

- Recognition at every meeting
- End of Year dinner with spouses
- Cup and nomination

Pain Points- access to data

Creating a Sponsorship Program (2 Sessions)

Remy Carpenter

Yes- 13

No- 3

Sorta- 3

Discussion re: Fundraising

Types of Sponsors



- Event
- Sponsor Spotlight
- Website
- Global/Annual (all council, all year)
- In Kind

Take advantage of your local uniqueness- i.e. wine country, local charities.

Invitation methods- how to get firms to support

- Board
- Committee

Councils who can be used as references:

- Spokane <https://www.spokaneepc.org/council/sponsors>
- Baltimore <https://www.baltimoreepc.org/council/sponsors>;
<https://www.baltimoreepc.org/council/sponsor-sales>;
- Bypassing the team or treating people unequally
- WI- Limits to 6 \$1000 sponsors per discipline
- Ask largest local firms to bring in their subject matter experts.

Who gets the job of raising sponsor revenue?

- Person- 1
- Board- 1
- Staff- 1

Diversity, Equity & Inclusion and Your EPC (2 Sessions)

Ginger Mlakar, Mavis McKenley, Susan Travis

NAEPC board started the DEI committee about 5 years ago as a way in which to provide membership with more resources. There's a commitment to inclusion. Would like to hear what's going on in local councils so NAEPC can help provide what they need.

Diversity across discipline, gender, ethnicity, it can be challenging to members at-large who don't understand what these things mean. One council is pricing out hiring a DEI consultant to really be thoughtful about how it's defined and applied.



Emerging leaders program was born out of DEI committee. Tension re: what diverse means.

Hired a DEI consultant and worked with him for the past 2 years. It's a commitment. Probably approaching \$50,000 over 2 years. Topic can be difficult for some people - helpful to have an outside person. Big question is WHY do you support diversity. This year started doing focus groups with deep, uncomfortable situations. Task force meets with consultant monthly. How do you get information from members - pronouns, etc.

Conversation can be very simple. Low-hanging fruit to bring in more diversity. Connect with law school, finance, accounting, DEI - reach out to different organizations to invite them. What was the catalyst to reach out to these other groups (the black bar, the Jewish bar)? Just making people feel welcome - invite them.

Inclusion, student membership, membership diversity - WHY? Effort is to close the racial wealth gap. Yearly race and wealth speaker series, endowed by some very generous members. Racial issues of history. Improve diversity in the profession (as well as membership). Amended bylaws to allow student membership category. Students can come to events at no cost. Keep them engaged. Annual diversity happy hour - partner with another organization that is in one of the diverse universes. Have some members who are very focused on helping with DEI. Diversity training for the membership at no cost.

How many councils collect data? Data on disciplines. None collecting additional gender or racial data.

When members go up for renewal, mandatory questions to answer. Vital to have demographic information - age, gender. Could use a third-party to get that information.

Important to have a baseline if you want to increase diversity.

Partner with a local business high school to talk to students once a month (in an under-privileged area). Community colleges would be a great place to reach out to as well.

Are we going to lose a lot of members to retirement, working on reaching out to highschoolers/college-aged students. What about those in the middle?

Want members to feel welcome. How do we accomplish that? How do we make sure that our members are welcome? Mentorship? New members have a buddy? Etc.

- Ambassador program
- New member lounge area
- Members are tasked with involving them.
- Greeters at meetings



- The venues chosen are venues that are comfortable for people - accommodate people - looking for places that had diversity of management staff, the venues appeared to be supporting diversity as opposed to exclusion.

Gender diversity in wealth management hasn't changed.

As a leader, great to be so progressive and think about what's best for this organization.

Diversity of speakers is great at the NAEPC conference.

How many have a DEI taskforce/committee? Most

Anything that National can do to assist? DEI webpage is provided, but anything else?

- Rather than seeing links, see action items.
- If councils are doing things that are working, send that to NAEPC.
- Washington DC is doing a lot.
- Answering the WHY is important - it's a great starting point.
- Councils seem more interested in learning about DEI and how to incorporate it into their council's activities
- How to make council more representative of community
- One council hired a consultant on DEI - struggled with how to take what is learned and actually put it into action - want it to be present in membership, leadership, programming, etc.
- Looking at DEI to help with all the efforts - to be representative of all and to encourage interest in the field
- Task force - looking for resources and ideas
- Lots of talk about getting a consultant in to work on DEI
- Venues can be inclusive or not
- What is the current status of DEI? Is it morphing into something else? It might be too politicized, therefore making it a "bad word" right now.
- Data - a lot of chapters do not have the data of WHO is in their council - age, race, etc. Can NAEPC help with that? Do they collect the data?
- Councils discussed putting it on the application to ask for data
- There are services out there (AI) - you can send your membership data off and you can get the data for a fee.
- Reached out to ACTEC when they did their reparations and kept the topic of DEI present in their programming
- On (Seattle EPC) website - people can visit the website and ask for someone to come speak about estate planning
- They've been going to high schools to provide mentoring opportunities and awareness
- NAEPC website - not enough is on the website is the feedback



- What DEI provides - allied organizations, speakers you can use, resources, etc.
 - What councils want to hear is what other councils are doing.
 - Need to reach out to some councils that have addressed DEI and share it with the larger NAEPC community
 - Would like action items, things that the local EPC can tackle, provided by NAEPC
 - Connect councils that are doing a great job of DEI with councils that are not
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- New members paired with ambassador, encourage senior board member to reach out, identify new members with pins/ribbons, have new member events (includes senior members)
 - Affinity groups can be formed as needed
 - Stick your name behind someone who is trying to get involved

Inspiring Volunteerism

Katie Sheehan

Decline post-Covid of board member participation, and committee member as well

Always out recruiting new members

Assign recruiting to board members as part of role, every board member is also on a committee

Outline options in the new member packet

Encourage membership to become involved in committees, there seems to be a generational shift, less volunteers than in the past

Committee meetings can be done virtually

Young professionals group? Several councils do

Young people are interested in volunteering but not so comfortable doing it in person, they need to be asked.

Micro-volunteerism

Scholarship program awarded to a junior or senior in college in one of the disciplines to be active in membership

2 tiered memberships- assign them a buddy, 3 years of experience or less, fairly new program

Added a button on the web page

2-day CLE, must be enrolled in law school

Attend meetings in person and participate in a 2-day series at a reduced rate

Hard to find ways to engage young people in CE

Keeping young people engaged is a challenge. You've got to go out and get them

Every new member is forced to join a committee



Member recognition

Letting people have face time, nametags are helpful things

How do you go about getting feedback? The dreaded survey!

Have a hard copy form on the table

QR Code with a couple of Yeti tumblers resulted in quite a response. Any correlation with timing of events- greater or lesser participation>?

Council switched to daytime luncheons post-Covid, which have attracted a greater audience than the pre-Covid dinner meetings

Hybrid meetings are expensive

St. Louis, annual dues and pay as you go for events

Engaged Members: How to get them and how to keep them + creating a member milestone program and awards (2 Sessions)

Sahar Pouyanrad

How does your council retain members:

- Have very good speakers and good content

How do you get good speakers?

- From other conferences
- Provide CE credit
- Board members are reaching out to members directly w/phone calls or coffee dates to ask what they want to see or do
- For new members: they wear a ribbon to everyone knows they are new; host new member coffee or happy hour so they can meet each other and don't feel awkward walking into a regular meeting

How do you get your members to participate and not just pay their dues?

- Ambassador program - every new member is assigned a buddy for their first year
 - Move location because their members like new experiences each time (wine tastings in wine country in Central Coast California)
 - "Coffee Connect" - a board member is assigned 1 - 2 members and they reach out to invite for coffee date
 - Some councils require a new applicant to know someone on the council and/or get 2 referrals
- Discussed how that can be prohibitive to attract new members



-Some councils have board members just sign off on new members as their referral based on the applicants resume; or instead of rubber stamp the board member will call the person to interview them before approving

How do you get seasoned members to participate more or get more involved?

- Ask them directly

How do you make members feel valued?

- Track attendance; if people haven't attended a board member will reach out and ask why

How to recruit new, younger members?

- Host "emerging leaders" happy hours
- Recruit from local colleges
- Offer scholarships
- Offer student memberships/reduced rates

Do you recognize 5, 10, 15 year anniversary or service awards?

- Every member got a certificate to post in their office to hopefully spur conversations and interest in the council
- Started a competition for who can recruit the most new members a year; then offer a prize
- "Member of the Year" award
- Small bit of recognition goes a long way
- Honor past presidents to keep them engaged

AEP designation and how it retains members of your council

- Explained the "Social in a Box" opportunity
- Promoted free speaker program through NAEPC

How do you hear from your members:

- Send surveys
- Combine survey/feedback with their CE/CLE form

How to recruit CPA?

- Opened up membership to "enrolled agents in the tax profession"

Personal relationship & invite

Email Recruitment

Free guest event

Personal email and phone call after meeting



Scholarship for emerging members- build loyalty
Mentorship programs
Membership engagement committee
New members get a buddy
New member thank you
Recognition in publications
New member table to sit at for first two months
Immediate invite to join a committee
New member meet up with invite to more seasoned members
Intro to group at meetings as a guest and a new member or read names
New member event with Committee Chairs

How does council define engagement?
Micro w/ application (?)
Perception- board sit at one table? Disperse through room?
Do people feel welcome to participate?
Ask for interest at time of application and renewals for their service interest
New member welcome packet
Videos of committee chairs talking about service
Pathways to Leadership
Hearing Your Members
Surveys
Use CE forms to ask questions
Ask questions at registration
With all publications

COUNCIL BY SIZE: Session One

Extra-Small and Small Councils

April Wise

Benefits of NAEPC:

- Councils are the member, not the individuals. Individual members are not always aware of what the benefits are.
- Value partners
- Webinars offered at value pricing. Emails go out, and emails may only go to council leaders. Unless councils have opted-in for members to receive the emails, they're not getting the information.
- Reduced pricing to attend conference.
- Ability to opt-in to the Journal.



- Opt-in to online listing of all members.
- Trainings that occur virtually
- Council leadership-only LinkedIn group
- Tradewing
- Programming resources - speakers - list of people that will speak free of charge. There's no speaker fee, but council pays for travel - one free speaker a year.
- Nominate members to be a part of the AEP program.
- Every council campaign - if council wants individual members to get NAEPC communications, you have to opt-in. There's a place on the website to do that. If you want to make sure they're individually getting it and the council doesn't have to forward to members, opt in.
- Website options
- Leimberg - per member fee
- Council recognition program - council awards
- If you go through the NAEPC website, national and local events will be on your website. Highly recommended.
- Option to apply to NAEPC for \$500 credit for an event, as long as the AEP program is discussed.
- Council nominations of the AEP - one council suggested that once someone has served President, if they're not an AEP, maybe nominate them

Hot speakers and topics:

- Start with topic, then ask for volunteers to find speakers.
- Planned structure of topics (ethics, economic development, charitable, etc.)
- Start by poaching what bigger EPCs have done in the recent years. Piggy-back with another council
- Speaker fees - some councils don't pay speaker fees, but give gift card or gift (orchid, mug, etc.), \$50 donation to a charity of their choice.
- Estate planners day - get top speakers, but also get sponsors. For typical meetings, do not pay speaker fee. Line the speaker up well in advance. It would be one person on the boards job, with help from other board members. It would get 200 people in the room (including sponsor) and would lead to new members. Members were not charged, but guests were.

Who is responsible for planning program:

- VP, speaker chair

Events

- Roundtable - a favorite event - case study, assigned seating - each table has one of each discipline - most well-attended event
- National trust company - there's a budget in-house to send speaker



- How many meetings do you have?
 - 6 bi-monthly - opened up committees to encourage membership growth. Every other month they do networking events.
 - 5 meetings a year - but also socials by discipline, separate from meetings.
 - Meet monthly, but speakers every other month, with socials in between.
 - 7 meetings, and 2 sponsored socials - plan the year in advance.

Any current topic trends:

- CPA reporting
- AI
- Planning for marriage - both before and during
- Estate planning with firearms

Any events offered every year?

- Probate judge panel - highest attended event - first meeting of the year to get people back in
- Charitable planning event toward the end of the year
- Joint meeting with another EPC
- Social meeting in May - alternate between a plus-one event and a baseball game with families
- Golf outing in the summer, pre-COVID. Holiday event in December.
- Collaboration case study - attorney and CPA to write a messed up estate planning scenario - split the tables up so there is only one discipline per table - hands on collaboration
- Shaking the tree (service) - it's a living case study
- Heckerling review (January)
- NIL discussion

Hot topics:

- Varies state by state, but Washington has a death with dignity act - end of life issues
- How to use AI in the industry
- Community property or joint trust
- Judicial panel
- Blended family
- Important to not have the same topics each year
- CTA

Hot speakers:

- Joslyn Margolis - variations of her CTA speech

Favorite speakers:



- Sam Donaldson
- Medicaid recovery

Q&A

How are people getting new members? How are you making people see the value of membership?

- Making sure that the older members understand the importance of bringing the younger generation into the organization.
- Gain sponsors
- How do we give them more value without spending more money? Ask a local bank/trust company and ask if they'd sponsor a social event
- Breakfasts in addition to dinners
- Success with lunch meetings? Some councils yes, some no.
- Associate category (2 years experience or less, no vote) of membership, emeritus category of membership - ask emeritus members for membership recommendations
- Cross pollination is important.

Council Leader Education Series

If you're not getting the emails with the training series, call NAEPC.

Council relations committee - should be getting an email from them once a month.

Medium Councils

John Midgett

How may have a liaison with National- 4 out of 21

Are you aware of resources for councils? No fee speaker program, webinars

Having a liaison helps to maintain continuity as to the relationship with national

Liaison is the IPP, do you recommend that or have someone dedicated to this role that remains over the course of years- may not have a specific term

Shared about the CRC, asked for people to join

Who are the members of NAEPC?- Councils and AEPs, NOT the individual councilmembers\
NAEPC Journal- did you see the email announcing the new edition? Please check it out!



Webinars

Do you allow locals to speak to your conference? Many do not

Baltimore does not pay for speakers

Who plans the meetings for your council?

- VP and speakers committee
- Committee that presents a slate to board for approval

Who would your council like to hear from if price were no object?

- Teresa- Seattle- WA State Tax very popular but hard to get
- IRS
- Sam Donaldson
- Wendy Goffe
- David Youe great speaker
- Larry Malcalm
- Anirban Basu
- Linda Duesal
- Jonathan Blattwall
- Jerry Hesch
- Bill Sarduson - McGuire Woods
- Legislative Update
- Justin Miller- only charges travel expenses
- Paul Zee

NY State now requires DEI CLE

Do you offer corporate memberships?

- Denver does
- Single \$350, corporate \$1200 for 4, 2nd or 3rd year doing it, still complete membership applications

Baltimore- Energy Planners group

Other disciplines- Business Valuation, Planned Giving

Takeaways:

1. How can I juggle CRC & Liaison roles?
2. Speaker/Topics on website



3. Social in a box, liaison helps build continuity, website
4. Names of speakers
5. How honest everyone was about the challenges we're facing
6. Corporate memberships, no wrong way to do things, just different
7. Key is the members
8. Tap into NAEPC resources
9. Social in a box
10. Social in a box, liaison to national
11. Spread the word
12. How to engage new members
13. Breadth and depth of resources through NAEPC
14. Council calendar
15. Social in a box
16. Council of excellence
17. Website collected group is a resource
18. Collaborate emphasizing relationships, networking
19. Liaison

Medium Councils

Karly Laughlin

Reviewed mission and vision statements of NAEPC

NAEPC is a resource to your council

Benefits of NAEPC (emphasized how these should be shared with members)

- Partnerships with organizations (can be found on website) to get discounts or subscriptions (like Leimberg)
- Webinars
 - Monthly; could be used as monthly meeting for council as a “lunch and learn” for example
 - AEP webinars; offered quarterly and tend to be deeper dives on topics
- Reduced rates for annual conference
- NAEPC Estate Journal (can't remember the full name)
 - Bi-annual
 - Promoted it as a great resource and encouraged people to submit articles
 - NAEPC offers editor feedback for those who want to be published and get their feet wet safely
- LinkedIn



- Please follow NAEPC's page
- Is your page private (closed group) or a public page?
 - Private allows members to chat and engage
 - Can be a lot of work to maintain
 - Public can be used for marketing and reach new people
 - Recommended to post photos to gain viewers

Council of Excellence Award

- The application can be used as a checklist on how to be a great council and how to do things right
- If you apply, you get one free webinar
- Use the NAEPC website templates

Do you know your council relations liaison?

Council Leadership Education Series (held virtually)

- Small group discussions held regularly and offers different topics

Speakers

- Bob King
- Bernard Krooks (found from last year's annual conference)
- Marty Shankman
- Sam Donaldson
- Anirban Basu (out of Arizona) Prof. of Economics
- Panels of local people
- ½ the group allows members to present/speak
- Ed Morrow
- Terry Franklin (DEI)
- Justin Miller
- Stephanie Loomis Price
- Amy Kanyuk
- Jerry Doyle (tax)
- Amy Florian

NAEPEC free speaker list



- Paul Caspersen
- Jordan Rosen

Hot Topics:

- Planning for special needs or elderly
- Tax updates
- Business development or soft skills vs. very technical speeches
- Divorce

Do you provide CE? Yes

When do you host your meetings?

- All answers varied between breakfast, lunch and dinner
- They avoid major holidays, sporting events

Do you collaborate with neighboring councils?

- Yes, nice to cross network and see new faces

Large and Extra-Large Councils

Dave Green

Benefits & Services Review

Member value partners

Educational Opportunities

President Elect of Boston assigns all chairs and vice chairs

Speakers

Heckerling

Poll members on speakers and topics

Professional etiquette – demand for but programming committee dunks it

May be better for emerging professionals

St. Louis- virtual and in-person simultaneously

Net = more attendees

Every so often in-person only

Make it the special one

If we want to appeal to younger professionals, we have to meet them where they are

Chicago- looked at schedule and changed the slowest months to virtual only

Boston- nope, ended this year



Budget and finance committee plans calendar each year
Hearing from members- "in person" but attendance is down
Virtual board meetings for cold/off months

What do you spend your money on?

- Capital Investments
- Offer discounted memberships
- Scholarships
- Spring invite to law schools to attend an event- students comped

Wants the monthly conference calls by size back

Procedures manual

Continuity plan

Boston- Board members are liaisons to a committee which is chaired by a board member
Review most burdensome tasks and start with those committed

Discussion about term of committee service- Boston- 1 year, but try to create some continuity

Recommended committees- Membership, Sponsorship, Programming

Social Media- about half, one has a "posting person"

Surveys- Annual, by meeting, With CEs

Membership Committees- Yes/No?

- Attracting new members
- Joint meeting with probate
- Raffle a membership
- Dispelled Myths about end (?)
- Enact year prime- Get x meetings free

Types- Student, Junior/Affiliate/Associate (don't meet regular requirements), Emeritus

Monthly Newsletter- ALL contacts

One free guest/year for every member

Warm intro to council then follow up with email to guest with value proposition & benefits



Guest recognition events, person who brought them introduces them

Voting Versus Non-Voting

Manage and use the prospective member list

Ask if they are interested in joining at Registration

Setting Your Council Apart: Honing in its Value Proposition and Benefits of Membership

Dave Green

What do councils provide:

- Community
- Opportunity
- Collaboration
- Quality education
- Opportunity for collaboration
- Multi-disciplinary perspective
- Socialization
- Cultivating relationships

What do EPCs NOT provide:

- Access to the NAEPC resources
- A national forum
- Broad focus
- Referrals (generally not a referral group)

What do EPCs do?

- We help...

What classifications of members do we admit into our EPCs? Estate planning professionals. Any unique classification of membership? Talked about funeral directors, but haven't gotten there yet. Auctioneers, those who specialize in downsizing, appraisers.

What are the pressing problems EPCs help address?

- Solving the ongoing estate tax situation and how to communicate with clients.
- Building, protecting and transitioning wealth according to the individual's wishes.

What outcomes/results do our EPCs deliver?



- New ideas, perspectives, problem solving, better armed to meet clients problems with solutions because we're more informed.
- We can provide clarity into clients' problems, can reach a consensus, which gives them the confidence to move forward.

What other organizations are your competition?

- Other EPCs near us
- Hesitant to work with another designation if they're not a member of NAEPC, as those people seem to be more willing to learn and put in extra work.

One council only brings in national speakers, which differentiates that council from others.

Higher quality material could drive more membership

Ask WHY. It's healthy to ask the why. Combination of value propositions and asking why make sense.

Once you come up with a value proposition, how will you use it?

- With the membership committee - as a way to gain members.
- On the website
- President can remind everyone about it at each meeting.

How to increase the number of young members

- Free student membership into EPC. Get sponsorship for Emerging Professionals group. They have their own social events. They pay full dues rate. Could get them in by providing a scholarship with decreased membership rates for a year or two.
- Is the value proposition for younger members different? Or is it the same? How do you teach them what they need to know in order for them to be the seasoned professionals in later years?
- Mentoring program. Encourage board to outreach for invites.
- It's no big deal for the firm to pick up the membership fees for associates. They'll then feel obliged to go.



Leveraging Committees (2 Sessions)

Rachel Votto

Do you have committees?

- You need to be on a committee before serving on the board
- Larger councils have many committees
- In Philly, they have board members on each committee
 - At each board meeting, they'd review each committee update but it would run too long since they have 12 committees

How do you onboard committee members?

- Orientation at the beginning of the year to review procedures
- Chair of committee is a 1-year term
- Birmingham is creating policies and procedures that can be passed down
- Others save their documents on the cloud

People discussed NAEPC websites and using the document tab

- Group asked how they can keep high level documents like executive committee minutes exclusive to certain members
- Be careful what you put in documents tab because leadership changes and future people can see past notes

Group discussed how to handle an applicant that was denied and then they pushed back

- Many agreed that these are typically realtors who don't have credentials or the qualifications to become a member

Do you have a committee to handle difficult situations? Everyone agreed that they rely on the executive committee

If you are a small council, how do you get people involved?

- 2 people can make up a committee and they handle a specific task
- Important to get members involved because the board can't do it all

Does your admin sit in on every committee meeting? Most agree no but the admin is in the loop and knows about them; can post info on website and committee reports back with the summary of the meeting

Do you have committees? And how are they utilized?

- Membership committee is critical for growth
- Programming committee
- Diversity, equity and inclusion committee



- Sponsorship committee
- AEP committee
- In Baltimore, they describe one committee per meeting so members understand what is offered
- Nominating committee
- Greeting committee (non-board members)
- New Hampshire doesn't have committees and rely on their professional admin
- Committees can take the load off the board
- Committees are a good breeding ground for potential board members

How has your council benefited from these committees?

- Engages members
- Identifies potential leaders/board members
- Diverse opinions
- Helps with accountability

Do people struggle to get volunteers to be on a committee?

- Do you ask members directly? Face to face and arm twisting can work
- Make it a part of the onboarding process of new members; ask which committee would you like to join?

New Hampshire doesn't have committees; where to begin?

- Their goal is to get younger members; recommended a social committee
- Baltimore has their committees listed on their website and shared with NH
- Could have a task force before a committee

On your renewal or application, do you ask which committee you are interested in?

- May be better to rephrase it as "What are your strengths"?

Have committees improved your council?

- DEI - helped outreach to the community

Council Executive Session with Webmaster (Double Session)

Tom Griffith and Bruce Newburger

The group used its time to discuss usability and upgrade suggestions:

- If Member Type unchecked "allow renewal," exclude from non-renewed active members emails



- Second email list filter- extra criteria “and” function
- Remove “Appear in Communications Group” option
- “Current Paid Member” “Guest of a Current Member”
- Lukewarm interest for limiting Member Only Pricing option
- Past member- membership landing page with reminder they have not renewed and link to renew membership
- ****Add “Active Renewed Members” as communications group
- Change Default in Documents to be Chronological descending
- Consensus that accordion menus make most sense on new system main menu
- Sponsor Image- Editor added
- Any Image Upload- Editor added
- Sponsors should be default top level menu tab
- Combine Member Files
- Drop Down Member List- All Members
- Use supplemental emails to connect RSVPs to member
- Login remains active once completed- Stay Logged In
- Prospective Member Application- find and merge two

AEP Council Nomination Program

Harvey Hutchinson

Collaborate with others in the estate planning community

Working with professionals in a different state

Leverage Point- like the CAP

Broward County- council nomination process was smooth

AEP is not well known in Southern Florida

Maryland does not require CLE

Ethics CLE is in great demand for attorneys

Puts you in the same group as Sam Donaldson and Marty Shenkman

Add note to online applications



Converting Guests to Members

Larry Bogar / 9 people

How do you handle guests

- Any council member can bring a guest and charge a bit differently ; then follow up with guest to try and recruit
- Boca Rotan has an opening social event that allows all guests for free
- Guests get a special color dot on name tag so they are recognized and welcome
- Philly does a lunch in Jan/Feb where guests can come for free; membership gets the list of guests and reach out to convert to members; they have @ 25% success rate
- Group discussed they have a hard time converting guests to members
 - One problem is that the council said they didn't have enough members talking to guests to engage them
 - Chicago has an ambassador program who is charged with connecting with guests or new members to make them feel engaged and welcome
- Guests are identified with name badges/ribbons

Do you have special events?

- Philly discussed how special events can become secular and not inviting; they make them part of the existing template and make them feel welcome - people don't think "Emerging Leaders" or "Women's Networking" events are open to everyone
- In Chicago, they have a new member table so they are recognized

Group discussed how to break up cliques and get people to network more

How do you get members to bring a guest?

- Raffle and prizes for members who bring a guest

What role does your board play?

- Board members chair membership committee
- During special events, board members are asked to connect with guests
- One council member was saying they have a hard time getting board members or regular members to attend these new member recruitment events so there isn't enough engagement

How do you follow up with guests after the event?

- Email from membership committee and copy the member who brought the guest
- Rely on member who brought the guest to discuss next step to application

Do you have a prospective member list/pipeline?

- Not really



- May be a good idea to keep in touch with guests - maybe 3, 6 months later

Do you send a thank you email to guests who attended the meeting?

- Included in follow up email

Does anyone make phone calls?

- If email doesn't work, yes
- Or they have coffee meetings

What do you include in follow up emails?

- Link to application
- Basic explanation of what the council does
- Include board members contact info if they have more questions
- Drive people to the website for more info

Operations Checklist

Eleanor Spuhler

- Set and share the entire schedule of Board Meetings so entire leadership can block the time on their calendar. Plan early.
- Schedule a transition meeting with incoming and outgoing presidents, liaisons, and chairs to share goals and best practices, discuss expectations. 3-4 Bullets for committee goals. 90 minute, informal, followed by dinner. Bylaws, Sponsor History, board history, financials, minutes, key policies
- Annual repeating / Taxes
- If council has Staff, schedule a President/Staff meeting to align roles, duties, and expectations



COUNCIL BY SIZE: Session Two

Extra-Small & Small Councils

April Wise

- Focus on quality over quantity. Private referrals and word of mouth.
- If you have more members in one discipline category that can be accepted in a year, they go on a wait list.
- Amended bylaws, creating emeritus membership. Moved some into emeritus, opening up the category a little.
- Some councils do not worry about ratios of each designation in their membership
- Balance on board
- 50% of your time or more has to be in estate planning - people talked about taking that back to their councils and using that as a membership requirement
- Realtors, home healthcare, mortgage, bankers are some of the members of some councils
- Associate membership - good for younger people
- Other category / at-large category - one council limits at 10%, others don't have any limits
- Realtor supplemental - to make sure there are clear lines as to what the council expects from them as a member (probate real estate)
- Home healthcare person - struggled with the value of his membership - could use as sponsor instead
- Expanded designations to match the AEP - mirror the designations that NAEPC allows
- Corporate member - people at large firms that are too busy, any two people from their firm can come - cost is about double the cost of a regular membership
- Incorporated guest fees
- NAEPC website is very good
- RSVP's required - signing in at the door
- Annual dues and how many meetings
 - \$425 - 5 dinners - need to get more sponsorships - need to look at breakfast meetings to make it cheaper
 - \$125 - 5 meetings and a couple socials - pay \$40 at the door (\$55 for non-members) - sponsors at each meeting (\$375/sponsor)
 - \$550 - 5 meetings plus 8 hours CLE
 - \$250 - 11 meetings - 2 socials then a speaker and repeat - covers website and admin costs, etc.
 - \$400 - 9 meetings, \$75 for a guest, once a year bring a guest for free once a year, guests can only come once; if a guest joins, their guest fees are wrapped into their membership costs
 - \$400 - 7 meetings, 2 sponsored socials that cost nothing



-\$425 - 6 meetings (3 breakfasts, 3 dinner) and a social event. Senior member (age requirement, must have been a member of a local council for 10 years) dues at \$150 and pay as you go (\$75 for dinner), etc.

-Some councils are educational, some are anti-networking, dues should be a little bit more for the networking groups, who get both education and networking

- Another way to expand revenue is to charge late fees or frame it rather as an early bird
- When you increase dues, do members fall off? No.
- It's not one size fits all - what are you providing? Demonstrate the value of membership. Providing dinner, providing wine, providing CLE
- Every year or two increase dues costs a little
- If you're providing value, members should be able to see the value if you're starting to increase the prices
- Leimberg
- Breakfast meetings
- Make it someone's job to be the greeter (VP of membership)
- How many councils are using a FT admin?
 - Went through the process of finding an admin, but don't have one. Using a paralegal of someone who works for someone on the board.
 - Start with Eleanor, b/c she may have recommendations.
 - Search for association executives online
- 80 members, 10 board
- 87 members, 6 board, 2 committees
- One council pays \$935/month for admin
- Are admins treated as independent contractors? Yes, and they should receive 1099.

Retaining membership

- Follow-up and ask people why they're not renewing
- If they're an AEP, they have to be a member
- Retiring - create an emeritus category
- Remind them of the value they're receiving
- Make members feel welcome - personal contact
- New member packet - bylaws, AEP materials, cheat sheet of member benefits, contact list of board/chairs and how to get involved
- Website link to new member packet online

Board meetings

- Via zoom
- Sign up to bring one thing to meeting
- Breakfast meeting - one a year - strategic planning



Not all councils apply for the Council of Excellence

- Process isn't that difficult, although application looks a little daunting
- It's a great program/process to get them excited

Takeaways:

- Case study event
- Higher quality meetings
- create/edit bylaws
- Breakfasts instead of 5 dinners to help bring costs down, maybe lower dues, more sponsors, add social events (networking) to the calendar
- Council of Excellence
- Look into new categories - emerging professionals
- Set goal for council to nominate more people for AEP
- AEPs have to maintain council membership, which is a win for the council
- Create a nominating committee
- Commit to LinkedIn page - and congratulating AEPs on the page
- Council nominations of AEPs
- Annual survey to the membership for feedback
- Annual checklist for the board

Medium Councils

John Midgett

Central AZ- philosophy on membership- Is more better?

- Ashley- trying to grow next-gen membership and focus on DEI
- Not a specific number, but want to grow, 140 members currently

Better to have members on roster, or have engaged members?

- Hampton Roads- retention and growth, we have more than we need, reinvesting in CDs at this time
- For collaboration and engagement it would be great to have all members involved
- Michelle Chapin- 265 members in DC, very little attrition
- Very strict requirements, 2 professional references, 1 who has known prospective member for at least 2 years

Anyone can come as a guest

Net loss of members recently due to retirement- What do you do now as a leader to address?



Push for student members and younger ones

What designations are required?

- JD, CFP, CAP, CLU, Valuation Expert, CFA or CTFA
- At-Large membership- nonvoting, 2 realtors, members over 10 years- don't really fit into the membership
- Dina- smaller council of 75 members, will admit anyone who indicates they are in estate planning
- Any other levels of membership? Associates, students- recruit from area colleges and law schools
- Bob -utilize Marquette Law School, have an internship process

What is the hardest category to fill?

Educate schools about the importance of Estate Planning

Do you have quotas by discipline?

- Hampton Roads- no one discipline can account for above 40% of membership total
- Tweaked the restrictive language a bit
- Dual roles in their professions
- Dues- John- we decide in December if we'll prorate dues

NAEPC- 1/3 in checking, 1/3 in 6 month CD, 1/3 in longer term account

- Dina- Advise council to keep 1 year of operating expenses in some kind of account
- Member retention? Great programming!!
- Any new ideas about techniques to help new members?

Reasons people don't pay dues? Not meeting expectations

- Michelle- one idea is including a short survey on the CE form or online
- Dina- one of her smaller councils lost half of their membership during Covid

Any retention policy?

Any benefits that your members are seeking?

- Business referrals

Assist with the networking process

Assign old members to reach out to new members

What topics are important to you that we haven't addressed so far?

- Creative programming
- RT Case study to see how each discipline would handle the situation as described in the case study



- Social Events
- Bowling Happy Hour

What motivates the various generations?- a speaker addressed this topic

- Dina- Practical management seminar, do it virtually

Attendance is lower for soft skill topics

- Patricia Galvinizcus (?) Portland, OR trust in building relationships
- Maggie Callahan- What you learn when people are dying
- Mary Donahue- “The Next Chapter”

Engagement beyond the regular meetings?

- Wake Up Wednesdays- hosted in someone’s office, coffee, no programming
- Study Group
- Summer Social
- Alternate coffee hour with happy hour

Takeaways:

1. Creating a policy around member engagement and retention, not just good intentions
2. Getting board members involved in greeting new members
3. Emphasize shared responsibility among the board for welcoming new members or reaching out to existing members, a more welcoming operation
4. Indicate on name tags “New Member”
5. Follow up with potential new members
6. We need to utilize the benefits of NAEPC
7. What is NAEPC
8. Social in a box, Seattle, PP just got the AEP- will speak, Liaison with National
9. Red River- Social in a Box
10. CAEPC- Social in a Box
11. Focusing on planning in advance for programming, emerging professionals
12. Using the renewal form to ask them to serve on a committee or what’s of interest to you?

Medium Councils

Karly Laughlin

Philosophy

Almost everyone stays in the same meeting location

Discount for early renewal

CAEPC



\$575

7 Dinners with speakers

Holiday/charitable

Not Golf

Baltimore

200-250 w/meals

2 meeting requirement

Tampa

\$500

Dinners 3rd Wednesday

Now 299

Monthly day rotates

No dinner

Speakers have changed

Almost every council is a single fee/pay as you go

Events kick off year

Budget

Dues Notice

Publication

Naples Explained publication- print & digital, Consumer publication, Generates decent revenue

Large and Extra-Large Councils

Dave Green

Membership - do you have restrictions or quirks or philosophies?

- St. Louis - applicants are referred by a current member so they generally get good candidates
- Boston has a full member and associate members, they also offer junior membership for students
 - After 5 years an associate member can become a full member
- Chicago - allows for emerging/student members who have 2 or less years of experience; then they can grow to "associate" member who have 2-5 years' experience, then full member
 - They also offer "retired" membership
- Philly also reaches out to college students and invites them to a meeting for free
- Throughout the years, councils have changed their membership levels



Are more members better?

- More the merrier but not relaxing qualifications
- Trend is more financial planners (younger) and less attorneys
- In Spokane, they have a bylaw that caps the number of voters per profession

Do you have retention problems?

- Boston has maintained @ 700 members consistently
 - Membership committee is charged with retaining members and finding new members

How do we get members to be engaged or on committees?

- Have an annual meeting where a packet is distributed with expectations of their members
- Testimonials on how the council has helped them over the years
- Figure out what members want and adapt the council to it

Group discussed concerns of younger generations

- They do not want to commit to leadership roles and take on risk, more responsibility and/or effect work/life balance
- Boston has very specific job descriptions so people know what the experience will be and the expectations are
- They want a personal, emotional connection
- Seems like they are scared or unwilling to do cold networking
 - Boston member says that his company is teaching young professionals how to network, take small steps and ease them into it
 - Create a safe space to network

Group discussed guests

- Boston doesn't allow guests
- Cost is not prohibitive
- Chicago hosts a breakfast after tax season and ask members to bring a guest
- St. Louis allows guests and charges member and non-member rates

Ended with - what is one thing that you are taking back to your councils from these discussions?

- Katie from Boston - reaching out to schools for emerging leaders
- Barbara from Boston - figure out where to spend their surplus
- Tom from Boston - be more mindful about the venues they choose and look at it through the DEI lens
- Craig from Boston - benefits of AEP and plan to host session back in Boston
- Renee from St. Louis - NAEPC website can host documents like meeting notes, etc.
- Ms. Sheehan from Chicago - build a prospective/pipeline of prospective new members



- Elliot from St. Louis - create a goal of 2 new initiatives that the board can handle
- I think Chicago - focus on new generation