



59th Annual NAEPC Advanced Estate Planning Strategies Conference with Pre-Conference Sessions for Council Leaders

November 15 - 18, 2022

COUNCIL LEADERSHIP DAY LEARNING POD TOPICS & DESCRIPTIONS

EVENTS

[Crafting Events with Broad Appeal](#)

It's clear that the days of educational-only programs on the same day, time and location each month are behind us - members are demanding more diversity in programming. This session will address what makes for a well-rounded yearly programming calendar that appeals to a wide variety of members, will give leaders an opportunity to share what is working for their council and what is new, different or exciting, and how a change to a programming schedule can positively impact attendance and enhance member satisfaction.

[Hot Speakers & Topics](#)

Looking to complete your council's programming calendar? Attend this session to brainstorm the hottest speakers and topics as shared by other councils.

MEMBERSHIP

[Best Practices in Welcoming New Members](#)

That person who has been lurking at your council's events as a guest has finally joined – now what? This session will address concepts for welcoming new members and brainstorm new ways to onboard members in a way that makes them feel welcome, inclined to remain active, and wanting to get more involved).

[Creating a Member Milestone Program & Service/Achievement Awards](#)

5 – 10 – 15 – 20... Recognition of milestones is an important part of member satisfaction. This session will brainstorm best practices in recognizing member milestones, along with other ways to strengthen the bond with your members via service and achievement awards.

[Engaged Members: How to Get Em' & How to Keep Em'](#)

Engaged members make a council vibrant, welcoming, and appealing. Sign up for this session to explore ideas to keep your existing members excited about the council and their membership, get your newest members to be more active, and even how to encourage the council's more seasoned members to continue to actively participate on a regular basis.

[Recruitment of Younger Members: Your Council's Ticket to the Future](#)

The elusive "young" members... are they hidden in plain sight? Attend this session to somewhat define "young" as it relates to membership status, to explore your council's framework with regard to admitting younger members and their experience when joining the council, and to dive into how best to find and recruit these individuals to membership and keep them as members.

OPERATIONS

Becoming a Council of Excellence

The Council of Excellence Award, in addition to being NAEPCs highest council honor, is considered to be a roadmap of best practices from which every council can benefit. Attendees can expect to learn about the application and questions asked within, as well as what has made the winning councils so successful.

Creating a Sponsorship Program / Increasing Non-Dues Revenue

Many councils are creating or refining sponsorship programs and exploring other options like job posting services to help increase revenue, which may also allow your council to hire a staff person, keep dues low, support special initiatives, and continue to provide an exceptional membership experience. This session will address best practices and new ideas to grow revenue and create programs that will be exciting and appealing.

Diversity, Equity, and Inclusion & its Impact on Your Council

Diversity, equity, and inclusion is used to describe policies and programs that promote the representation and participation of different groups of individuals and is an increasingly important topic for membership associations, including NAEPC. Attend this pod to have an open and thoughtful discussion about DEI as it relates to your estate planning council and its membership and future.

Employing an Association Executive

Having an executive allows an association's board of directors to take their focus away from daily administrative tasks like meeting preparation and dues mailings, and transfers that time and energy to direction, growth, and new initiatives. Often, however, there are concerns about the ability to find and pay for a qualified individual in this role. Attend this pod to learn more about the benefits of having a staff member, as well as finding, funding and integrating an association executive into your council's operations. **This session is limited to those councils that do not currently have staff/an association executive.*

Help! Our Board, it's BORED!

An engaged, dedicated, and working board of directors is critical to the success of any membership association. This pod will address ideas related reinvigorating a board of directors, how best to handle under-performing volunteers, and strategies to ensure that your board is happy, healthy, and leading the council toward a bright and successful future.

How to Implement the Accredited Estate Planner® Designation Council Nomination Program

We know that the Accredited Estate Planner® designation is the only graduate designation in estate planning, but what's this Council Nomination program all about and how does it differ from a self-nomination? Attend this special session to learn about the privilege available to all estate planning councils affiliated with NAEPC, followed by open discussion of how councils have successfully implemented an annual program that assists with member engagement and retention.

Operations Checklist

This important and detailed session will address the "must have" items in a council's operations checklist and offer a starting point from which to ensure that each yearly transition is smooth, consistent, and efficient.

TECHNOLOGY

[Dipping a Toe into Social Media, What's Right for Your Council?](#)

Options for a social media presence are plentiful and seem to be changing every day. So what's the best option for your council? Attendees will review the most popular platforms, conversations that should take place before creating a group or social media presence, and "must have" policies and procedures. Attendees will leave with the beginning of a sketch of a social media strategy for their council.

[Making the Most of your Council's NAEPC-Hosted Website](#)

Your council has this fantastic website – now what? This session will offer an opportunity to learn about maximizing the features of your NAEPC-hosted website platform and have your questions answered by the NAEPC team.

**This session is available only to councils that have a website hosted by NAEPC.*

[NAEPC-Hosted Website Platform: About Us to Contact Us](#)

Interested in learning more about the NAEPC website options? Attend to learn more about the capabilities and features of the NAEPC-hosted websites and how they can assist your council in its daily operations and as a tool to generate non-dues revenue.

**This session is available only to councils that do not have a website hosted by NAEPC.*

SOMETHING MISSING?

[Email us](#) your suggestions for additional / future topics.

[View all virtual and in-person events hosted as part of the Council Leader Education Series](#)