



## Woodland Hills Tax & EPC (CA)

*The Association of Choice for Estate Planning Professionals*

**NAEPC**News  
May 2020



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### Message from President John P. Garniewski, Jr.

Managing Change and  
Uncertainty



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### May 13, 2020 Webinar

Collaboration Matters:  
Working Together to Produce  
Extraordinary Results with  
Albert E. Gibbons, CLU®,  
ChFC®, AEP® (Distinguished)

Live at 3:00 pm ET



### Who We Are



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NAEPC by Robert E. Fox,  
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## Message from the President



**John P. Garniewski, Jr., CPA/PFS, CFP®, AEP®**

Family Office Solutions, LLC  
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Dear Members & Friends:

What a whirlwind the first few months of my presidency and this year have been! Our daily lives have changed so dramatically in recent days; patience and flexibility have certainly become the association's keywords as we navigate changing times. You are invited to review the [NAEPC response to COVID-19](#) on our website.

The board of directors and staff have never been more grateful for the support of the association's members, councils, sponsors, friends, for the technology that allows us to stay connected during these disconnected times, and for the ability to continue on with many of our regular activities. Our board is working diligently to review our activities and to provide value to our members, specifically for those items related to estate planning in these uncharted waters. This message will provide you with several updates on these activities.

The national board of directors has recently voted to endorse the efforts of each state and other jurisdictions to enact legislation permitting, on a permanent basis, remote notarization and remote apostille designations on all estate planning documents in order to help clients to more efficiently carry out their estate planning objectives. NAEPC, with its 2,100 Accredited Estate Planner® designees and 270 councils and their 30,000 allied professionals, is in a unique position to assist in this effort; we hope you, our members, will find it valuable.

As work situations for most professionals are now almost exclusively remote and may remain so for quite some time, we are very pleased to be able to provide our members with access to "How I'm Changing My Practice and Client Meetings to Address the Coronavirus" with Jonathan G. Blattmachr, Esq., AEP® (Distinguished), Mitchell Gans, JD, Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished) & Paul Gentile of LogMeln, Inc.\* This one-hour webinar is graciously offered on a complimentary basis by Stephan R. Leimberg, JD, AEP® (Distinguished) and Leimberg Information Services, Inc. (LISI). The presenters share their thoughts and steps they are taking within their own practices related to signing documents in the current environment, offers an audio overview of a virtual client meeting and document signing and working with homebound clients, and provides a review of helpful technology-based services and practices that may ease the transition to working remotely or that may help remote work be more efficient. Access this [complimentary on-demand program](#) and [download handouts](#).

The board has also formed a task force to investigate the creation of a resource library of educational items related to estate planning in light of COVID-19 and we are grateful to president-elect William D. Kirchick, Esq., AEP® for leading this group.

The health and safety of in-person event attendees, members, sponsors, and guests is of utmost importance and the most critical issue currently in front of the association's leadership. At this time we have not made a decision to cancel the [57th Annual NAEPC Advanced Planning Conference](#), but are carefully reviewing options and retain the right to do so if it is the best interest and health of the attendees/members. We've made slight adjustments to other activities and are now addressing the possibility of delivering the Regional Leadership Day Conference virtually, which have historically taken place in June. Although challenging, these extremely

important conversations and changes provide a unique opportunity for NAEPC to branch out into new initiatives and delivery methods for educational and developmental programming.

One of the things that has become abundantly clear in recent days is how committed the Estate Planning Councils are to their members. Our staff, board members, and [council relations representatives](#) are fielding questions from council staff and leaders about how to keep members engaged, how to continue to provide educational programming, and when and how to move forward. This certainly demonstrates the commitment that the councils have to their members, a commitment we hope will be shared with the councils in return when meetings and events begin again.

If, in the days ahead, you find yourself with some extra time or simply need a break, please register to attend a webinar in the [Robert G. Alexander Series](#). These upcoming and on-demand programs are an excellence source of educational content and the first of the season have received excellent survey results! Now is also the perfect time to learn more about the [Accredited Estate Planner®](#) (AEP®) designation. Applications are being accepted and our program administrator, [Susan Austin-Carney](#), is excited to answer your questions and would be delighted to process your application in the days ahead.

Our national network of estate planning professionals has never been stronger. Together, we will help our country emerge from this situation stronger and prepared for our "new normal." I encourage you to [contact me](#) at any time during the year with your questions and suggestions.



*\*Reference to a specific product, process, or service does not constitute an endorsement or recommendation by NAEPC. NAEPC assumes no legal liability or responsibility for the accuracy, completeness, or usefulness of any information, product, process, or service offered within this program.*

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## The Collaboration Corner

### Brought to you by Susan J. Travis, CFP®, CTFA, AEP® and the NAEPC Multi-Disciplinary Teaming Committee

Now, more than ever, it's imperative that we connect with our clients and their collective team of professionals with a "back to basics" approach to estate planning.

I recently had a client's daughter call their attorney concerned about mom's estate plan being effective with the market downturn. He discussed legal issues and encouraged her to reach out to me, the family's wealth manager and financial planner, to address cash flow and investment issues. I spoke to the family and alleviated their concerns about income and cash flow the mother needed. I further worked with the mother's accountant to optimize a Roth conversion for her this year while there is no required minimum distribution from her IRA. The team was able to show a clear case of tax savings due to our joint planning. With permission, I updated the attorney as to all of the planning opportunities we utilized. In this case, the attorney, the accountant and the financial planner working together allowed this family to see how their



team of professionals collaborates in the client's best interest and placed them in a position of comfort knowing their goals were not only being met, but exceeded.

This "back to basics" approach works year in and year out, and is especially imperative during these trying times. The various aspects of the CARES Act provide a terrific reason to collaborate with other professionals regarding your joint clients and is a powerful message to your clients

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We are grateful for the support of all sponsors and exhibitors for the [57th Annual NAEPC Advanced Estate Planning Strategies Conference](#), including those shown below. You may click on each logo to learn more.

Join us in Ft. Lauderdale from November 3-6, 2020.

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## Who We Are

### Reflections on the Values of NAEPC

By Robert E. Fox, CLU®, AEP®

There are many associations claiming to be estate planners and there are a multitude of esoteric definitions of estate planning, some including the complexities of the latest tax codes to complicated trusts.



Maybe it need not be so complicated. How about focusing on the simplicity of leaving the client in better shape, direction and understanding then when one first got there and serving a client at any level on the financial scale? This is simpler than the Dodd-Frank, Department of Labor approach and is the right thing to do.

But then, what's in it for me? Where do I shine? People are funny. If they do something smart and beneficial for themselves, they want to brag about it and tell their friends and associates. Thus begins the referral system, which is for "Me."

Money isn't everything...why can't we have both?

*Bob Fox is a long-standing Accredited Estate Planner® designee, council member, and volunteer for NAEPC. His tireless commitment to NAEPC and the pursuit of excellence in estate planning and client service is appreciated by NAEPC*

## Resources



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[NAEPC National Website](#)

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*Board of Directors and by the committees on which he currently serves, the AEP® and Council Relations Committees, and in his prior role as editor of this section of the newsletter.*

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