

ESTATE PLANNING COUNCIL OF NORTHEAST WISCONSIN POLICIES
(Updated November 2016)

Board debriefing meeting will be held within two weeks of the annual meeting, the spring seminar and fall seminar.

A speaker's one page outline is due to Brian Mudd 2 ½ months before the seminar date. The outline is required 60 days in advance to submit for CE credits.

Speakers will receive a \$100.00 gift certificate for each hour they present. If a speaker is from out of town, consideration will be given for mileage/hotel stay. We normally do not pay speaker fees.

The treasurer will advance a set amount of \$2,000 total to the member who has been approved by the board to attend the national conference (NAEPC).

The golf outing will be open to non-members. The fee for non-members will equal the current member golf fee, as established by the board, plus the current annual membership dues, as established by the board.

The price for a non-member to attend a seminar is the sum of the current dues and the single seminar cost, as established by the board. They cannot attend the dinner as this is for members and his/her significant other.

Membership information shall not be given to any other organization. Membership information is only to be used for official Council business, as approved by the Board.

The person holding the position of Brown County Register in Probate will become an honorary member of the Estate Planning Council. Honorary member means that no annual membership dues are paid. The person holding the position of Brown County Register in Probate will need to pay to attend any seminar, dinner or event.

The Annual Meeting will be open to guests, but limited to two per member. The guest will pay the same cost for the luncheon as the member.

The Board does acknowledge that the AEP and EPLS designations are worthy of obtaining and will promote the designations to its membership, but will not nominate any members. The Board will complete the Membership Application Form when received by a member.

If a member wishes to come for "Dinner Only" and not attend the seminar, the cost of dinner shall be the seminar registration fee plus the member cost for dinner and the cost for a spouse or significant other, if one is also attending.

If a member makes a reservation for the dinner, but does not pay or make a timely cancellation, then the member will be billed for the cost.

In order to more closely match income and expenses, on a regular basis the board shall review annual dues, the annual meeting luncheon costs, the seminar fees, and a member's dinner fee and the spouse/significant other's dinner fee.