



# Baltimore Estate Planning Council

## Council's Plans for 75th Anniversary

Congratulations BEPC! The Council will be celebrating 75 years of existence. The Board and 75th Anniversary Committee are planning some special events in 2010 to honor this milestone.

Here is some early background and history of the Council that you might find of interest.

- The Council traces its roots all the way back to 1937
- Named the Baltimore Life Insurance Trust Council, it was originally founded by trust officers and life underwriters as a means of sharing information and promoting harmony between these two groups as they provided clients with life insurance proceed distribution services
- Joseph L. McMillin was elected the first president for the 1937-1938 year
- Although there was no documented restriction, in 1943 the board formally approved women life underwriters as members of the Council
- In the late 1940's, the concept of the "estate planning team" began to take hold nationally, and in 1950, the Council's membership agreed to admit ten attorneys as members
- Attorneys were allowed into the Council based on recommendations from Council members

- In an effort to broaden the estate planning team approach, certified public accountants were invited to become members in 1953 using the same method
- In the 1950's, membership in the Council became a much desired privilege, and the Council established a membership waiting list. Rules were passed that required members to attend two meetings per year to in order to maintain their membership status
- As the Council's mission evolved from its original purpose of bringing together trust officers and life underwriters to a more broad association among various groups of professionals dedicated to the creation, conservation, management, and distribution of wealth, a name change was approved in 1956 to the Baltimore Estate Planning Council. It was also at this time that attorneys and accountants were allowed to become officers.
- In 1961, an additional qualification for membership was implemented. New members from the life underwriter, attorney, and accounting fields were also required to have at least five years of experience in estate planning matters

Watch for e-mail on additional information regarding BEPC's 75th Anniversary activities during the coming BEPC year.

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### *2010-2011 Calendar of Estate, Financial and Tax Conferences (including websites provided for more details)*

**National Association of Insurance and  
Financial Advisors (NAIFA)  
Annual Meeting** - Orlando, FL  
September 11-15, 2010  
[www.naifa.org](http://www.naifa.org)

**National Association of Personal  
Financial Advisors (NAPFA) Practice  
Management & Investments**  
San Diego, CA  
September 22-24, 2010 [www.napfa.org](http://www.napfa.org)

**Financial Service Professionals (FSP)  
Forum 2010,**  
Orlando, FL - October 8-10, 2010  
[www.financialpro.org](http://www.financialpro.org)

**Financial Planning Association  
Annual Meeting** - Denver, CO  
October 9-12, 2010  
[www.fpa.org](http://www.fpa.org)

**NAPFA Connections**  
Boston, MA— November 3-5, 2010  
[www.napfa.org](http://www.napfa.org)

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Contact BEPC Headquarters at  
410-465-7011 or by e-mail at  
[becp@rxassociationmgt.com](mailto:becp@rxassociationmgt.com) for  
additional information

*(Continued from page 1)*

### **45<sup>th</sup> Annual Heckerling Institute on Estate Planning.**

Orlando, FL, January 10-14, 2011

[www.law.miami.edu/heckerling/](http://www.law.miami.edu/heckerling/)

There are other educational opportunities afforded members outside of conference attendance, such as webinars. If you go to the Benefits for Members section at [www.naepc.org/memberbenefits](http://www.naepc.org/memberbenefits), you will find a webinar series under "Educational Opportunities." You can earn continuing education credits, and special pricing is available in the "members only area" of the website.

### **Specialized NAEP Designations to Strive For**

Looking to improve your skills and credentials? Looking to further specialize? The NAEP administers two designations that you may want to consider:

**Accredited Estate Planner (AEP) Designation.** This is a graduate level specialization in estate planning available to any member who is an attorney or holds certain designations. You can find out how to qualify and what is required to earn this special designation by accessing [www.naepc.org/AEP](http://www.naepc.org/AEP). Or, contact [becp@rxassociationmgt.com](mailto:becp@rxassociationmgt.com) for more details.

**Estate Planning Law Specialist (EPLS) Designation.** For attorneys only, this is an ABA accredited program that demonstrates a high level of professionalism and commitment to the concept of specialization. See complete details about standards for certification at [www.naepc.org/estatelaw](http://www.naepc.org/estatelaw).

### **47<sup>th</sup> Annual Conference of the NAEP Foundation November 17-19, 2010—San Diego, California**

**47<sup>th</sup> Annual Conference of The NAEP Foundation** will be held in **San Diego, CA, November 17 through 19, 2010** at a premier, ocean-front destination. Presenting at the conference will be distinguished speakers such as Lawrence Brody, Samuel A. Donaldson, Robert Keebler, Bernard Krooks, Jeff Pennell and many more.

For those who have an interest, you can go online to [www.naepc.org](http://www.naepc.org) to review the [conference sponsor kit](#). In addition, online reservations are now available so reserve your spot!

Continuing education credits will be available for Accredited Estate Planner® designees as well as for

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accountants, attorneys, insurance professionals, Certified Financial Planners® and Certified Trust and Financial Advisors.

### **Eyeglasses Found**

A pair of red wire rimmed glasses were left behind after Anirban Basu's February 2010 presentation. If these are yours please contact BEPC Headquarters at 410-465-7011 so they can be shipped to you.

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