



# NEWS RELEASE

*Improving financial awareness & financial literacy™*

A Financially Green Organization™

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## **Alert: Third Week in October (October 17 – 23, 2011) is National Estate Planning Awareness Week**

Cleveland, OH, August 26, 2011 – Please join our distinguished 2011 Honorary Co-Chairpersons Sidney Kess, renown tax expert, author and speaker, and Andrea Millar, who leads the American Institute of Certified Public Accountants (“AICPA”) Personal Financial Planning (“PFP”) Division, in promoting **National Estate Planning Awareness Week** to your organizations, colleagues, associates, members, employees, readers, customers and donors. This can be accomplished by placing editorial content on your website and newspapers, and by planning community programs built around estate and financial planning during the month of October.

Estate planning is one of the most overlooked areas of personal financial management. It is estimated that over 120,000,000 Americans do not have up-to-date estate plans to protect themselves and their families in the event of sickness, accidents, or untimely death. This costs the affluent and middle classes wasted dollars and hours of emotional hardship each year that that can be minimized with proper advanced planning and action.

**The NAEPF Education Foundation**, the Synergy Summit, (<http://www.synergypro.org/>), a unified think tank and voice of the leadership of following eight major financial and legal services organizations:

- American Association of Attorney - Certified Public Accountants
- American Bar Association - Real Property, Trust and Estate Law
- American Bar Association - Tax Section (Estate and Gift Tax Committee)
- American Institute of Certified Public Accountants
- Society of Financial Service Professionals
- National Academy of Elder Law Attorneys
- National Association of Estate Planners and Councils
- Partnership for Philanthropic Planning)

and other professional organizations representing over 400,000 attorneys, accountants, trust officers, life insurance and financial planning professionals, have made an ongoing commitment to promote **National Estate Planning Awareness Week**, the third week in October each calendar year.

Rep. Mike Thompson (D-CA) and 49 other members of the House of Representatives co-sponsored and helped pass H. Res. 1499 on September 27, 2008, creating a Congressional Proclamation for National Estate Planning Awareness Week.

Visit [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org) for a full text of the proclamation. This is a real win-win-win proposition!

- Individuals and families want to improve their financial awareness and implement appropriate estate and financial planning so they can live out their dreams and not become a burden to their families. To do so, the public must be better informed about their estate planning and financial responsibilities.
- Financial professionals, financial service organizations, and the media that provide services to the public want to help the public become financially literate and implement appropriate planning.

- Nonprofit organizations, the government, professional organizations, employers, friends, and family that are supported by the public also want each American family happy and flourishing. Individuals, organizations and American society as a whole compose a common community that will directly benefit from pleased, productive, and financially successful individuals.

The public wins; the financial professionals, financial service organizations, and you the media that serve the public wins; and the overall community wins with a strong and financially sound economy.

During the months of October and April professionally authored estate and financial planning feature articles can be located and downloaded at [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org) for use as content for public websites, newsletters and newspapers, magazines and other media outlets. There is no cost for the published information.

This creates an excellent opportunity for financial services companies, nonprofits and the media to build annual programs around both **National Estate Planning Awareness Week** (October).

On behalf of **The NAEPC Education Foundation** & the participating organization, thank you for your efforts in making **National Estate Planning Awareness Week** a success and for having an ongoing impact on improving awareness and personal financial literacy across our country.

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During the past 49 years the **National Association of Estate Planning Planners & Councils** (“**NAEPC**”) has grown into the leading multi-disciplinary professional organization for estate planners, serving over 230 affiliated local councils and their 28,000 credentialed professional members.

**NAEPC** membership represents various professionals in the areas of accounting, law, life insurance, trust services and financial planning. **NAEPC** provides its members with ongoing education and a forum for professional networking within both the estate and financial services professional communities and the broad nonprofit, charitable and long-term care communities.

**The NAEPC Education Foundation, Inc.** was formed in 2005 as a 501(c)(3) nonprofit organization with its mission to

- Provide the public with financial awareness programs and improve financial literacy
- Educate the public regarding the benefits of the multi-disciplinary team concept of estate and financial planning as espoused by the National Association of Estate Planners & Councils
- Develop educational programs for estate and financial planning professionals
- Develop and promote a community outreach program for the general public
- Hold educational conferences, seminars, forums, and meetings regarding estate and financial planning

Our Foundation’s underlying vision is to significantly improve both the public’s financial awareness and their financial literacy, while developing educational content to assist professionals in providing high-quality, cost-effective services to the public.

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For additional information about **National Estate Planning Awareness Week**, or to schedule an interview with Joseph V. Falanga, CPA, AEP®, TEP, President of **NAEPC** and **The NAEPC Education Foundation**, or Robert G. Alexander, JD, LL.M., AEP®, EPLS, Chairperson of The NAEPC Education Foundation Committee, or Valentino Sabuco, CFP®, AEP®, The NAEPC Education Foundation’s Executive Director/Publisher, please contact Eleanor M. Spuhler at 866.226.2224 or [eleanor@naepc.org](mailto:eleanor@naepc.org), or visit us at [www.NAEPC.org](http://www.NAEPC.org) and [www.EstatePlanningAnswers.org](http://www.EstatePlanningAnswers.org).