



# UTAH VALLEY ESTATE PLANNING COUNCIL

## Membership Benefits

Conference and Education opportunities		Benefit
Annual NAEPC Advanced Estate Planning Strategies Conference		\$1,075 member
LINK: Legacy Companies Online Education		\$169 for members
Robert G. Alexander Webinar Series		\$60 for members
AICPA Engage- June Conference		\$100 discount
ABA RPTE Paralegal eLearning Program		
American Law Institute CLE		40% discount
Council Speaker Program		"No Charge" speaker program
Resources		Benefit
NAEPC Journal of Estate & Tax Planning		Free
Bloomberg BNA's Art of the Estate Tax Return, Second Edition by Keith Schiller		20% discount
Disinherit the IRS		25% discount
Estate Planning Smarts: A practical, User-friendly, Action Oriented Guide		20% discount
Family Business Magazine		Yearly rate of \$59.00
Florida Domicile Handbook: Vital Information for new Florida residents		25% discount
Heart2Heart Workbook and deck of cards		10% discount
The LastingMatters Organizer: A tool to deepen relationships with client's next of Kin		15% discount
Leimberg Information Services LISI Subscription		discount pricing
The Life Documents Organizer Kit by Smead		20% discount
The Charitable Planning Desk Reference for Advisors		Free
Trusts & Estates Magazine		60% discount
Washington Institute for Graduate Studies		10% tuition waiver
Services		Benefit
Acquire Seminar Marketing		
Advance Choice, DocuBank: Access to Documents		\$20/person for 1 year \$60/person for 5 years
Legal Directives, LLC		25% discount
AdvisorAdit- Mobile Event Services		50% off standard rates
Digital Conference Book, Course Surveys, Attendance Tracking		
Ahrens Technologies, LLC Innovative Website Solutions		25% discount
Card Connect- Merchant Account Services		Qualified transactions cost 1.55% + 20¢. Qualified non-swiped transactions cost 2.25% + 20¢.
Cloudia CRM Assistant		\$29.99 per seat
Estate Planning Binders.com- Legal Presentation Binders		\$1.00 off per binder
Legal Binders Now (LBN)		Discount Pricing
LegacyStories.org		15% discount

M Brand Film, Inc. 0 Video Production for Estate Planning Councils	20% discount
My Personal DataSafe Comprehensive system for sharing and managing client information	10% discount
Ruby Receptionists	6% discount
Sterling Cut Glass	10% discount
The Merrill Anderson Company	66% discount
The National Underwriter Company	15% discount
The Ultimate Estate Planner, Inc.	15% discount
WealthManagement.com	50% discount
Zola Creative Media	20% discount
<b>Software</b>	<b>Benefit</b>
Family Wealth Map <i>360-degree view of clients' estates. creates alerts for deadlines</i>	10% discount
Everplans <i>Life and legacy platform helps gather important documents</i>	Special NAEPC pricing
Everything but the House <i>Network of bidders helping sellers maximize value of belongings</i>	\$100 rebate
HeirSearch.com	
Klark Proposal Software, Inc.	discount pricing
Lawgic, LLC	15% discount
My Perfect Will	10% discount
WealthTec Suite	\$150 discount
Yourefolio Inc.	20 % discount