**MEMORANDUM**

To: [Council Name] Board of Directors

From: [Conference Attendee and Position with Council]

Date: [Enter]

Re: National Association of Estate Planners & Councils Leadership Day   
Post-Conference Report

**NAEPC Benefits and services overview**

In this section of the memo, include your notes from the review of NAEPC benefits and services, which took place at the beginning of each day.

**sharing session notes**

In this section of the memo, include your notes and new ideas from each of the sharing sessions you attended. Remember that these took place in both general session and breakout rooms.

**five best ideas or new initiatives**

Use this section to recap your five favorite ideas from the conferences and to note any new initiatives you would like your board to consider based on these ideas. This is also a good area in which to offer a report on areas the council specifically wanted you to cover during your time at the conference.

**people I want to follow up with**

Use this section to make notes of those you’d like to follow up with and why.

**next steps**

NAEPC recommends making a plan to ensure that your council gets the maximum value out of your attendance. Here are some helpful next steps to get you started:

* Complete the memorandum for your board of directors
* Hear a really great idea? Schedule some time to talk to the person who shared it!
* Review your notes
* Read the session notes when they are released
* Schedule a “huddle” with others who attended with you or other events to flush out ideas and to prepare a report / action plan for the council’s board of directors (Attend alone? Block off time within your schedule to do so!)
* Report to the entire board of directors, including recommendations for new initiatives
* Create a plan to check-in with the leaders of the other councils you met during the event post-conference