

EPC Name Strategic Planning

Strategic Planning

2022-24

Strategic Planning Process

- Meeting to review
 - SWOT Matrix (Strengths, Weaknesses, Opportunities, and Threats) and Key Findings
- Articulate vision for EPC
- Identify key strategic goals and objectives
- Establish beginning Action items for goals and objectives
- Assign responsibility and due dates for goals and objectives

MISSION

- **Council Mission:** The purpose of this Council is to....
- **NAEPC Mission:** *The National Association of Estate Planners and Councils (NAEPC) will promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the AEP® and EPLS®*
- **NAEPC Vision:** *NAEPC will be the association of choice for professionals engaged in the practice of estate planning. NAEPC will foster the multi-disciplinary approach to estate planning designed to meet the needs of clients at all stages of their lives, with an emphasis on wealth preservation and legacy.*

Summary SWOT

STRENGTHS	WEAKNESSES
THREATS	OPPORTUNITIES

Proposed Mission



Proposed Vision

Proposed Goals & Objectives

Objective	Goal	Action Item	Responsibility	Due Date	Measurement
Stronger Board	Committees	Determine 3-4 committees	Vice President	March 2022	List of committees presented to Board
		Get Chair for each Committee	Pres/VP	April 2022	Present list of Chair to Board
		Get Committee members	Chair of Committees	May 2022	Present list of members to Board
		Schedule meetings	Chair of Committees	May 2022	Present schedule to Board
	Leadership	Review Exec Cmte R&R	Board	Feb 2022	Approved R&R

Proposed Goals & Objectives

Objective	Goal	Action Step	Responsibility	Due Date	Measurement
Stronger EPC	Mission/Vision	Review and update	Board	Feb 2022	Approved Mission and Vision by Board/Council

Proposed Goals & Objectives

Objective	Goal	Action Step	Responsibility	Due Date	Measurement
Increased Membership	Community Outreach	Approve Action Plan	Community Outreach Cmte	March 2022	Plan presented and approved by board
	Tequila tasting				
	Golf Outing	Review Survey	Board		

Proposed Goals & Objectives

Objective	Goal	Action Step	Responsibility	Due Date	Measurement
Increase Revenue	Increase Sponsorships				

Next Steps



Key Take-Aways and Insights

