

Gregory E. Sellers, CPA, AEP®

Warren Averett, LLC

Montgomery, Alabama

Do you remember how the old movies had the seasoned editor and cub reporter (kind of like Perry White and Jimmy Olsen in Superman)? Do you remember in those movies and shows how the cub reporters, learning the ropes, were taught to ask the questions "Who, What, Where, When, and How"?

Then along came "Law & Order". *Insert sound effect here "Dun, Dun"*. This program introduced a new facet to our tenacious desire to **know more**. Law & Order elevated which component of knowledge to the forefront? **MOTIVE**. No one can be convicted unless Jack McCoy can convince the jury there was motive for the crime. So now, we must know "Who, What, Where, When, How and...**Why**"

In his presentation on "How Great Leaders Inspire Action," Simon Sinek points out that everyone knows "What" they do. For example - I do tax returns. I prepare individual income tax returns. I prepare trust income tax returns. I prepare gift tax returns. I prepare estate tax returns. I even do estate planning. Is that very unique? Not really. Some people know "how" they do it. I ask my clients to bring me their tax information; I sit down at my computer and enter the data. Sometimes, I have to compile the data into a usable format from client records. I then check it over for accuracy, and print out a copy for the client to review. After they have approved and signed, I transmit the return to the government agencies. That's not much better on the excitement scale. The government trained monkeys to be astronauts. That doesn't say much for a tax return preparer. But very few people ever really think about, or express, "why" they do what they do. I help families, along with their other advisors, navigate the tumultuous web of income and wealth transfer tax laws, all the while, keeping at the core of my efforts the client's desires to have a comfortable life, help their philanthropic causes, and preserve their wealth, large or small, enabling them to leave a legacy to the objects of their bounty. The "Why" is your purpose, your cause, or your belief. Which of those guys do you want to hire or work with?

Trusts & Estates magazine published an article this past April written by John T. Midgett, an attorney and AEP® in Virginia Beach, VA. John and his local estate planning council "get it" and have embraced the team concept of collaboration. John's article follows an attorney from the time he learns of possible new clients through his initial meeting with them, and how he effectively uses teamwork to address the clients' issues. Take a few moments to read that article if you have it. If you don't have it, I encourage you to visit the current issue of the [NAEPC Journal of Estate & Tax Planning](#), for it is present there.

NAEPC has been, and is continuously working on, collaboration of professionals for the betterment of service to our clients. In 2011, we assembled a task force of some of the nationally-known, leading minds of estate planning, and we asked them questions about their perception of the future of estate planning. One of the questions was "How do you think the membership of estate planning councils will/should look during the next few years?" These three answers rang through:
Estate planning councils need broader membership - While the local councils have their own governance, NAEPC can facilitate the understanding of inclusion of non-traditional estate planning disciplines, but credentialed professionals must continue to be encouraged.

- Better collaboration among the professional disciplines.
- Council members need education opportunities - local council programs, national education conferences and webinars illustrate the emphasis on knowledgeable advisors. **Councils also need to educate the general public what they need to expect from professional advisors.**
- Why do we do what we do? For the benefit of our clients. Take advantage of your membership and let your clients know "WHY" they need you.

I hope this helps you help others.

