

**APEX (Affiliate Presidents Exchange) Meeting**  
**May 14 – May 15, 2015**  
**Hyatt Regency Crystal City, Virginia**

Affiliate leadership gathered ahead of the NAEA Installation Banquet and board meeting to discuss issues and disseminate information from NAEA and between affiliates. The day and a half event encourages strengthening relationships between affiliates and with NAEA.

In line with the NAEA strategic plan, membership augmentation and retention are top priorities. Katrina Holland, CAE, NAEA Membership Director, and Michelle McBride, EA (Wisconsin), NAEA Membership Committee Chair, unveiled the goals for the 2015-2016 year, which include increasing membership by 1,500 members, maintaining member retention rate above 90%, and increasing the value of membership by providing and promoting member and affiliate benefits. NAEA is using several strategies to achieve these ambitious goals.

- It is also returning to paper invoices starting with those on the June 30<sup>th</sup> renewal cycle.
- The iGetMembers campaign continues, with incentives for members who successfully recruit new members. If you know of non-member EAs, please invite them to join.

Twila Midwood, EA (Florida) provided a public relations update regarding NAEA accomplishments to increase EA recognition:

- In October/November 2014, NAEA had a two minute video with Lonnie Gary, EA (now NAEA Immediate Past President) on 5,800 American Airlines flights with 100,000 passengers to discuss who we are and why we are America's Tax Experts.
- During tax season, NAEA also participated for the first time in a National Public Radio (NPR) sponsorship, which directed listeners to the new customer-facing [www.eatax.org](http://www.eatax.org) website. This was hugely successful, with 5,000+ sessions on the Find An EA section of the site, 9,000 page views, an 80% first-time user rate and average sessions of 2 minutes.
- NAEA also produced 8 tax season feature articles which were published in places with millions of readers. Also, NAEA has free customizable press releases available to members on the website. To find these resources, login at [www.naea.org](http://www.naea.org), go to Member Resources, and select Tools for Members.
- We also discussed the successful Arizona Society of Enrolled Agents Superbowl fly-over. The banner is available for affiliates to use for nominal fees (plus flyover costs).

We had an IT Update to discuss the ongoing review and changes on the NAEA website and the Find An EA profile. Less than 5% of all NAEA member profiles are complete. Consequently, we have a Profile Challenge! **Between now and October 15, 2015, the affiliate with the greatest percentage increase in complete profiles will win a prize (to be determined). PLEASE login to NAEA and review your profile. Complete as much as you can!**

We also received an update on **Educating America** from Jean Nelson, EA (California), task force chair. The program is growing, but there are some challenges in reaching students. We were reminded of the job fair booth which NAEA will ship free to affiliates for use at job fairs and trade shows. If interested in Educating America or the fair booth, please contact myself or Jeff Gentner.

Other Items:

- We also had presentations regarding email marketing, online event registration and online forms. Our own Jeff Gentner, EA, illustrated online event registrations by showing affiliates NYSSEA's 2014 conference e-registration process.
- We also had discussions with Gleim, our Educating America partner, and with Thomson Reuters. Thomson Reuters introduced a new pricing structure.

Robert Kerr, NAEA's Senior Government Relations Director, talked with us about the preliminary results of the **2015 Fly-In** event. NYSSEA was well represented among approximately 107 member advocates who visited more than 150 legislator offices to discuss a three-point agenda. It was a successful day all around and enjoyed by the participants.

I suggest you spend a few minutes exploring the NAEA website and the member resources section. You'll see many valuable benefits for your use, from press releases to member discounts.