



National Association of Estate Planners & Councils

1120 Chester Avenue – Suite 470 – Cleveland, Ohio 44114

ACCREDITED ESTATE PLANNER DESIGNATION AEP EMERITUS STATUS FORM

AEP Emeritus Status is defined as:

- Substantially retired or disabled
- Age 65 or older
- 15 years of continuous & significant involvement in estate planning
- Previous 5 years of continuous AEP in good standing

An AEP Emeritus is exempt from the continuing education requirement, the Affiliated Local Council membership and is only responsible for half of the yearly dues (currently \$50.00). The remainder of the annual recertification requirements must be met in order to stay active.

Please return this page, along with \$50.00 Annual AEP Emeritus dues to the address at the top of the page.

I, _____, hereby certify that:

- 1) I am substantially retired or disabled (circle one). If disabled, offer an explanation here:

_____;
- 2) I am currently licensed or currently hold the designations on record as my primary discipline, the same is in good standing and I am not subject to any disciplinary investigation;
- 3) I will promptly supply third-party verification or information from which third-party verification may be obtained regarding any of the foregoing, if I am one of the persons randomly selected for audit;
- 4) I have 15 years of continuous and significant involvement in estate planning;
- 5) I have been an AEP in good standing (dues paid) for the previous 5-year period.

I agree that:

- a) I will continuously abide by the NAEPC Code of Ethics;
- b) I will adhere to the team concept of estate planning; and
- c) NAEPC may contact my applicable licensing authorities or designating organizations regarding my credentials and my continuing education providers and I authorize such authorities, organizations, and providers to respond to any inquiry.

Signature _____ Date _____

Printed Name _____

Telephone _____

For office use only Status accepted: Y N
Reviewed by: _____
Date: _____