



# National Association of Estate Planners & Councils

...serving affiliated local councils and their members

## AEP ALERT

...THE OFFICIAL UPDATE FOR ACCREDITED ESTATE PLANNERS

MARCH 2006

[WWW.NAEP.C.ORG](http://WWW.NAEP.C.ORG)



### A Message from the Chair

Michael W. Halloran, ChFC, CFP®, AEP, CLU, REBC, RHU, LUTCF  
Jacksonville, Florida

Welcome to your next edition of the *AEP Alert*, the official newsletter for Accredited Estate Planners! Your AEP Committee continues its commitment to encourage and disseminate research, discussion and debate among estate planning professionals.

During this past year, the committee has worked hard to enhance the value of your AEP accreditation and to maintain its status as the premier estate planning designation. We constantly discuss new ideas, opportunities, and benefits that will enhance your AEP experience. The AEP Committee is pleased to have reached the following objectives that have greatly increased the prestige and usefulness of your designation.

The following enhancements and initiatives have occurred in the past few years:

- ❑ Access and discounts to the Blattmachr's Wealth Transfer Planning software
- ❑ NAEPC's 43<sup>rd</sup> Annual Conference - this year to be held on Amelia Island in Florida
- ❑ Research libraries, technological information, and product discounts from CCH
- ❑ Access to Leimberg Information Services/LISI through a participating affiliated local council
- ❑ Continued networking and concurrent projects among the nations leading estate and financial planning organizations through the Synergy Summit ([www.synergypro.org](http://www.synergypro.org)). Participants are:
  1. NAEPC
  2. Society of FSP
  3. American Institute of Certified Public Accountants
  4. American Bar Association – Real Property, Probate and Trust Law Section
  5. American Bar Association – Tax Section/Gift and Estate Tax Committee
  6. NAELA – National Academy of Elder Law Attorneys
- ❑ Election of the 2006 Class of Distinguished Accredited Estate Planners (DAEP's)
- ❑ Continued development of the NAEPC's publication - *NAEPC Journal of Estate & Tax Planning*

If any of you have any ideas that will help the prestige of our designation, please send them along to us!

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It's that time of year again!

AEP Dues & Recertification forms have been mailed.

Don't miss the May 1, 2006 deadline – your designation becomes "inactive" if all components of the renewal have not been completed by the deadline!

See page 4 for more details.

### NOTICE

The AEP Committee is looking to expand by adding non-NAEPC Board members to the group!

Please contact Chair Mike Halloran at (904) 399-8308 if you have an interest in becoming active.

### Did you know?

We have the AEP logo available in an electronic format for use on letterhead and business cards?

Call (866) 226-2224 for details!



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### Upcoming Annual Conference Information

Due to the situation in New Orleans caused by Hurricane Katrina, the NAEPC Board of Directors made the extremely difficult decision to implement a change in the upcoming conference schedule. Please mark your calendar with the following dates:

**43<sup>rd</sup> Annual Conference ~ November 1 – 3, 2006**  
**Amelia Island, FL ~ Amelia Island Plantation**

**44<sup>th</sup> Annual Conference ~ October 31 – November 2, 2007**  
**New Orleans, LA ~ Astor Crowne Plaza Hotel**

#### *NAEPC's 43<sup>rd</sup> Annual Conference*

November 1 – 3, 2006

Amelia Island, FL ~ Amelia Island Plantation

The 3-day conference program features one day devoted solely to affiliated local council leadership development. As such, the Wednesday, November 1, 2006 **Council Leadership Day** schedule is geared toward information for leaders from the 170+ affiliated councils throughout the country. The remainder of the program is of a technical nature and will feature a talented collection of local and national speakers and will offer continuing education for Florida attorneys & insurance professionals, CFP®'s, CTFA's, CPA's and PACE credit.

The conference is located at the **Amelia Island Plantation** ([www.aipfl.com](http://www.aipfl.com)). The hotel is a AAA-Four Diamond, 1350 acre property with four 18-hole championship golf courses & 23 clay tennis courts located just 30 miles North of Jacksonville. The Amelia Island Plantation also features a health and fitness center, award-winning youth programs, fine shops, a full service spa and excellent choices of dining options.

Amelia Island, FL is one of America's few remaining unspoiled island paradises and is the southernmost of the chain of Atlantic coast barrier islands that stretch from North Carolina to Florida. Its rich history, 13 miles of uncrowded beaches, lush, natural setting, moss-covered oaks, unparalleled golf, boating, and fishing, stunning sunrises and sunsets, and friendly "locals" make it more than just a place to visit.

Further information will be distributed via postal and e-mail as the conference approaches.

#### **NOW AVAILABLE**

**The NAEPC has a limited number of Ashworth golf shirts with the NAEPC logo available for sale!**

**Shirts are \$25/each and sizes range from XL – XXXL!**

**Contact the National Office for more information!**



*Sand dunes on Amelia Island at dusk*



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### DESIGNATION BENEFITS

Your continued maintenance of the AEP Designation makes it possible for you to take advantage of the exciting programs, services and discounts offered by the NAEPC.

A complete and continually updated list of member benefits can be found by following this link to the NAEPC website: [http://www.naepc.org/member\\_services.web](http://www.naepc.org/member_services.web). ***This is what you'll find there today...***

NAEPC members can purchase ***Business Week Magazine*** at a special members-only price of \$39.97 for 51 issues - you save \$213 off the cover price! As an added benefit, you'll also receive FREE access to Business Week Online with every subscription. Log on for expanded news stories, previews of the upcoming edition, and a searchable archive of issues dating back more than 5 years! It's a library of history and information available for retrieval 24-hours a day!

***CCH, a Wolters Kluwer business***, features an extensive line of research materials and software solutions that are the professional's first choice for reliable, practitioner-oriented guidance for advising clients and making critical business decisions. CCH and NAEPC joined together to offer NAEPC members a 30% discount on outstanding books on practitioner matters written by the leading experts. NAEPC members also receive a 15% discount on the powerful and versatile CCH ViewPlan Advanced estate planning software that allows you to quickly and easily generate easy-to-read graphs, reports and flowcharts that visually guide your clients through various planning scenarios – motivating them to take action.

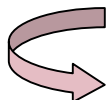
***Wealth Transfer Planning™ Estate Planning Software... Intelligent estate planning software.*** This complete estate planning drafting system (with expert system capabilities) offers a full complement of forms -- wills, revocable trusts, irrevocable trusts, strategic planning memos, powers of attorney, and more. While Federal in scope, state specific content is provided for all states (except Louisiana). The integrated "content help" is in a class by itself. From solo practitioners to large firms, WTP meets the demands of the most experienced estate planners. This state-of-the-art estate planning system authored by Jonathan Blattmachr and Michael Graham is fully networkable. With over 10% of the AmLaw200 now using WTP, it has become "the system of choice" for experienced trust & estate attorneys. The NAEPC is the only organization currently receiving a discount on this product!

Through a special arrangement with ***Kettley Publishing Company***, NAEPC is pleased to make a very special opportunity available just for our members and Accredited Estate Planners. Members can subscribe to the nationally recognized Kettley software solutions at great savings. Included in this special offer is ***Back Room Technician***, the industry standard source of client proposal information and concept material.

***Konica Minolta*** is an international leader in document imaging and production equipment and has factory direct pricing on equipment, service and supplies at discounted prices to the members of NAEPC. Konica Minolta entire document imaging line of equipment was selected "Line of the Year" for 2005 by Buyers Laboratories. Buyers Laboratories is the imaging industry's independent consumer testing facility. Konica Minolta's document imaging equipment meets a host of imaging capabilities, featuring copying, fax, network printing and scanning. Combined with software designed to find, archive and control documents. This new technology will change the way you do business.

NAEPC members can purchase ***Splendid Legacy: The Guide to Creating Your Family Foundation*** at a special members-only price of 20% off. ***Splendid Legacy*** is the first and only comprehensive guide designed especially for donors, families, and their advisors.

Subscribe to ***Trusts & Estates*** at the member rate of \$219.00 and save 12% off the regular price, over 40% off the cover price! This low rate includes 12 monthly issues, the year-end directory issue - the Wealth Management Resource Guide - and unlimited access to the online "Archive of Articles" which allows you to search nearly 20 years of ***Trusts & Estates*** editorial.



**TO FIND SPECIFIC ORDERING DETAILS AND CONTACT INFORMATION FOR THE PRODUCTS AND SERVICES FOUND ABOVE, GO TO THE "MEMBER SERVICES" PAGE OF [WWW.NAEP.C.ORG](http://WWW.NAEP.C.ORG) TODAY!**



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### ACCREDITED ESTATE PLANNER DESIGNATION INFORMATION

All AEP's are required to annual recertify their compliance with the requirements necessary to maintain the use of the designation. In addition to yearly dues, these requirements are...

The AEP is engaged in "estate planning activities" as defined within the AEP application.

The AEP is licensed or currently holding the designation(s) noted as the AEP's primary discipline and that the same is in good standing and not subject to any disciplinary investigation.

The AEP has satisfactorily completed a minimum of 30 hours of continuing education during the previous 24 months, of which at least 15 have been in estate planning.

The AEP has maintained membership in an affiliated local council. Individual / At-Large membership is **required** in cases where an affiliated local council does not exist near the practice of an AEP. Questions about this requirement should be directed to the NAEPC office.

The AEP has currently satisfied the continuing education requirements of his/her designated professional discipline.

The AEP will promptly supply third-party verification or information for which third-party verification may be obtained regarding any of the foregoing, if he/she is one of the persons randomly selected for audit.

The AEP will continuously abide by the NAEPC Code of Ethics.

The AEP will adhere to the team concept of estate planning.

NAEPC may contact the AEP's applicable licensing authorities or designating organizations regarding his/her credentials and continuing education providers and the AEP authorize such authorities, organizations, and providers to respond to any inquiry.

**To retain the ability to use the AEP Designation in 2006, all designees must complete all requirements by May 1, 2006. A directory of AEP's will be prepared for the website and will only include those designation holders that are in complete compliance as of May 1<sup>st</sup>.**

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### AEP Consumer Tri-Fold Brochures ARE HERE!

All AEP's that are current and in good standing with all designation requirements are now entitled to purchase quantities of a tri-fold brochure intended as a supplement for clients. These brochures outline the requirements to obtain the designation, the ongoing recertification requirements and offer just a bit of history about the NAEPC.

These items are available at a cost of \$.20/piece + actual postage cost. An order form can be found on the "Information for AEP's" page of [www.naepc.org](http://www.naepc.org).

**[Order your supply today!](#)**



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## NAEPC SPEAKER'S BUREAU

The NAEPC Speaker's Bureau is a tool to help NAEPC Affiliated Local Councils find a qualified speaker able to talk on a wide variety of estate planning topics. The Bureau is searchable by state, topic, keyword or name and lists topic and contact information for each speaker. The NAEPC Board would like to populate this area with as many AEP's as possible, but we need YOUR help!

Those interested in being added to the online directory should call the NAEPC office at (866) 226-2224 for details. An interested party must first speak to an affiliated local council and have a current Board Member from that council write a letter of recommendation to the NAEPC. The remainder of the details are handled by the NAEPC's Administrative Office.

## 2006 ACCREDITED ESTATE PLANNER COMMITTEE MEMBERS

**CHAIR** ~ Michael W. Halloran, ChFC, CFP®, AEP, CLU, REBC, RHU, LUTCF  
Jacksonville, Florida

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