



National Association of Estate Planners & Councils

...serving affiliated local councils and their members

AEP ALERT

...THE OFFICIAL UPDATE FOR ACCREDITED ESTATE PLANNERS

JULY 2006

WWW.NAEP.C.ORG



A Message from the Chair

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

We have had a number of great things happen since you received your last newsletter! Our goal is to continue to make your designation the valuable and respected accreditation that you are proud to use. At the recent Million Dollar Round Table meeting in San Diego, it was reported that the AEP designation was in the Top 5 of all designations present at the event! Our goal is to keep the growth going so the public is aware of the need for estate planning and the best way to find a qualified professional to do so.

Thanks to Lee Davis, our current Vice President, we now have Accredited Estate Planner license plate frames available for purchase. If you're interested in dressing your favorite vehicle up a bit, give the NAEPC office a call. The cost is \$10 for one frame or \$12 for two. They have been specially designed to comply with as many state laws as possible.

The Member Value & Services Committee is continuing their quest to secure valuable products and services available to AEP's at favorable discounts. Some of the companies we are currently working with are: CCH, Kettley Publishing Company, Civicom and Wealth Transfer Planning software. Many new projects are "in the works". Watch your e-mail for a very exciting benefit in conjunction with the University of Denver coming soon.

You can receive the best value for you membership by attending the Annual Conference this November just North of Jacksonville, FL on Amelia Island. We have a great line-up of speakers scheduled including, but not limited to, Jonathan Blattmachr, Jeffery Pennell, Steve Leimberg, Lou Mezzullo and Natalie Choate. The topics have been chosen to allow for ample coverage among the many disciplines represented by the NAEPC. Our annual social event will be right on the beach at the Amelia Island Plantation. Visit www.aipfl.com for information about the fabulous headquarters hotel that boasts 4 golf courses and award winning tennis facilities. Please place November 1 - 3, 2006 on your calendar and plan on joining us in Florida.

Finally, we are looking for some volunteers to serve on the AEP Committee. This group sets the agenda and reviews the plans for the AEP Designation. The time commitment is approximately two hours per month via telephone conference. Please give me a call for more information or to express your interest. The NAEPC Board is always looking for ways to make your designation more valuable and any ideas that you have are greatly appreciated.

See you in November at Amelia Island!

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Accredited Estate Planner license plate frames are now available to all current designation holders!

Orders can be placed by calling the national office at (866) 226-2224. The cost is \$10.00 for one plate and \$12.00 for two—put one on each vehicle!

Special thanks to Lee Davis as the AEP license plate frame was the perfect addition to Tennessee plate "ESTPLNR"!



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!

You are receiving this message as an active Accredited Estate Planner.

NAEPC ~ 1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114 ~ (866) 226-2224 ~ admin@naepc.org ~ www.naepc.org



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Upcoming Annual Conference Information

NAEPC's 43rd Annual Conference ~ November 1 – 3, 2006

Amelia Island, FL ~ Amelia Island Plantation
Co-hosted by the Estate Planning Council of Northeast Florida

- ❖ Have you ever wondered just how other councils operate?
- ❖ Are you looking for information on programs and services offered by NAEPC?
- ❖ Do you want the NAEPC Board of Directors to hear what you have to say?
 - ❖ Are you interested in top-notch technical education?

THIS IS THE EVENT FOR YOU!

Technical Speakers Include...

Martin E. Basson, JD
Rebecca L. Berg, JD, CELA
Jonathan G. Blattmachr, JD, AEP
Natalie B. Choate, JD, AEP
Aileen F. Condon
Lauren Y. Detzel, JD
Scott C. Fithian, CLU, ChFC
Timothy L. Flanagan, JD, LL.M.
Stephan R. Leimberg, JD, AEP
A. Stephen McDaniel, JD, AEP, EPLS
Allyson McDonald
Louis A. Mezzullo
Jeffrey N. Pennell
Arthea Staeger Reed
Joshua S. Rubenstein
Richard L. N. Weaver



*An aerial view of the Amelia Island
Plantation at sunrise.*



December 31, 2005

MARK YOUR CALENDAR NOW FOR 2007!

44th Annual Conference ~
October 31 – November 2, 2007

New Orleans, LA ~ Astor Crowne Plaza Hotel

Co-hosted by
New Orleans Estate Planning Council

*Join us in celebrating the rebirth of America's
most romantic, walkable and historic city!*



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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.

Here are just a few of the exciting items available to you as a current Accredited Estate Planner...

-AEP LICENSE PLATE FRAMES-

Available at a cost of \$10 for one or \$12 for two, these plastic frames have been specially designed to let the world know that you're a proud AEP! More information can be found on the "Information for AEP's" section of www.naepc.org.

-AEP CLIENT-BASED MARKETING BROCHURES-

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.

ACCREDITED ESTATE PLANNER DESIGNATION AUDITS

As a current Accredited Estate Planner designation holder, you are subject to a random audit procedure each year. Information request letters will be mailed in August. Please make sure that you return all of your information in a timely manner if you are one of the people randomly selected for the audit procedure.

NETWORKING OPPORTUNITY FOR AEP'S

The NAEPC's leadership continually strives to provide value to its membership through various programs, services and initiatives. The **Synergy Summit** is the newest of these opportunities.

The **Synergy Summit** is a unified think tank and voice of the leadership of seven major financial services organizations. In addition to the NAEPC, the remaining participating organizations are the American Institute of Certified Public Accountants' Tax & PFP Sections, the National Academy of Elder Law Attorneys, the American Bar Association's Real Property, Probate and Trust & Tax Sections and the Society of Financial Service Professionals. This group of professional organizations represents over 200,000 estate planning professionals throughout the country.

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Through the **Synergy Summit**, these seven organizations bring to their respective members and national policymakers the coordinated thinking and integrated actions of the nation's largest and most influential financial services organizations.

Visit www.synergypro.org for more details. Many thanks to Steve Leimberg for his efforts in creating and maintaining the Synergy Summit website!

2006 DIRECTORY

The directory of current AEP Designation holders is now available online! Visit the Accredited Estate Planner pages of www.naepc.org for a printable pdf file that is sorted by last name, state and affiliated local council for each practitioner.

HEAR WHAT THEY'RE SAYING!

"I have referred many people to the NAEPC Web site directory of AEPs. I have had several clients/prospects, etc. move from one state to another and ask me for an attorney, CPA or Life Insurance specialist in those states. I refer them to the AEP directory and they often call back thanking me. The AEP designation is more than a credential - it is a networking, team building designation for providing total team approach to estate and financial planning!"

Thomas M. Forrest, TO, CPA, AEP
US Trust Company of Delaware

Do you know of a professional that should receive information about the AEP Designation?
E-mail the name and e-mail address of the prospect to Candace Ristagno,
AEP Administrator, at Candace@naepc.org.

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.



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2006 ACCREDITED ESTATE PLANNER COMMITTEE MEMBERS

CHAIR ~ Michael W. Halloran, ChFC, CFP®, AEP, CLU, REBC, RHU, LUTCF
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Tampa, FL

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Alameda, CA

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St. Louis, MO

Leonard Neiman, AEP, CLU, ChFC
New York, NY

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Candace R. Ristagno, AEP Administrator

