

National Association of Estate Planners & Councils
The Association of Choice for Estate Planning Professionals
AEP Alert – June 2008

A Word from the Chair

I am pleased to report that the State of Nebraska Department of Banking and Finance has recently approved the Accredited Estate Planner (AEP) designation for use in practice for those in their state who hold the designation and work with seniors. This is a great step forward for the AEP designation, particularly at a time when states are becoming increasingly involved in certifying the growing number of designations. As the trend of designation regulation increases, I hope to be making similar announcements in the near future. Specifically, if you need any assistance in having the designation accepted for use in print and practice by your company, please let us know and we will be happy to help.

While many designation programs are losing members, I am proud to report that our designation holders are growing every year and we currently have over 1200 active AEPs. As this number continues to grow, the public demand to work with a qualified and credentialed estate planner grows with it. We often receive requests for referral lists and assistance navigating through the often confusing “alphabet soup” of professional designations and we are more than happy to oblige.

In closing, we believe that the Accredited Estate Planner certification is the leading estate planning designation in the country. Our designation committee continues to research all other designation programs so that we may compare our program and I can assure you that our designation requires a commitment above and beyond the typical requirements – both prior to attaining the designation and in maintaining it as well.

As always, we appreciate your input and feedback. If you have any questions or ideas about our designation program, please feel free to share them with me or with Susan Austin Carney, AEP Administrator, at 866.226.2224 or via email at susan@naepc.org.

Michael W. Halloran, CLU, ChFC, AEP, CFP®, REBC, RHU, LUTCF, MSFS, MSM
Vice President and Designation Committee Chairperson

NAEPC's 45th Annual Conference

Please consider joining us for the NAEPC's 45th Annual Conference from November 12 – 14, 2008, at the Doubletree Paradise Valley Resort in Scottsdale, AZ. We will be mailing a hardcopy registration brochure to you as a current Accredited Estate Planner shortly but in the meantime, please visit <http://www.naepc.org/convention.web> for more information. Don't miss this excellent educational and networking opportunity, along with an optional guided train trip to one of the Seven Natural Wonders of the World – the Grand Canyon! Hope to see you there.

Mark Your Calendars Now for 2009!

It's not too soon to begin planning for the NAEPC's 46th Annual Conference from November 11 – 13, 2009, at the beautiful Amelia Island Plantation in Jacksonville, FL. For more details, please visit our website at <http://www.naepc.org/convention.web>.

Improved Member Benefits

In an effort to continue to provide meaningful and enhanced benefits to our valued members, we would like to share with you the ways in which you can access your current member benefits as well as share with you some new enhancements. On April 23, 2008, we implemented a fully functional password-protected Member Benefits page on www.naepc.org (quick link: http://www.naepc.org/member_benefits_members.web). As you already know, you are entitled to take advantage of the valuable benefits, programs and services that our Professional Development & Education Committee works to secure by seeking out and approving Member Value Partners.

Accessing your password is simple!

- Step One – visit <http://members.naepc.org/admin/>
- Step Two – choose the “Forgot Password” option
- Step Three – enter your e-mail address as it appears in the membership directory
- The information will be e-mailed to you.

You will also find a link for making suggestions as to how we can continue to improve your member benefits at http://www.naepc.org/member_services_submit.web and we encourage you to do so. We recently implemented one such suggestion from a fellow AEP asking that we include your website address, along with your other contact information already listed on the national website. If you have not already done so and would like to take advantage of this opportunity to easily have this national online listing, please send us the link to your website via email to susan@naepc.org.

Accredited Estate Planner (AEP) Designation Audits

As a current Accredited Estate Planner designation holder, you are subject to a random audit procedure which is conducted on an annual basis by the AEP Audit Committee. Notification and compliance requirements will be sent by US Mail in July to those who have been selected for this audit. Please make sure that you return all of your information in a timely manner if you are one of the designation holders randomly selected for the audit procedure.

NAEPC Journal of Estate & Tax Planning...New Issue is Hot Off the Presses!

The most recent issue of the *Journal* is now available to you online at <http://www.naepc.org/journal/issue04a.web>. In his letter of introduction to the current issue, Lee Davis, NAEPC President, encourages each AEP to take advantage of this important and valuable publication. “This issue of the *Journal*, and your study of it, is another rung on your ladder of success in not only staying current in our ever-changing estate planning world, but also in gaining new insights into topics that are evolving. The *Journal* will also give you knowledge about the latest ideas in sophisticated estate planning techniques you need to discuss with your clients in order to provide the highest quality service available.” If you missed any of the previous publications of the *Journal*, they are only a mouse click away at <http://www.naepc.org/journal/archive.web>.

Distinguished Accredited Estate Planner Award

This annual award is designed to recognize significant and outstanding lifetime achievements and contributions to the practice and profession of estate planning within the five professional estate planning disciplines of attorney, accountant, life insurance professional, trust officer, and financial planner. We consider this award and designation to be the highest professional honor and recognition of the pinnacle of achievement and accomplishment within the field of estate planning. It is analogous to a “Hall of Fame” award within athletics and other professions. In fact, to the best of our knowledge, it is the only award of its kind within the entire profession of estate

planning! Please visit our website at http://www.naepc.org/aep_distinguished.web to see the outstanding recipients of this award. If you are interested in nominating someone for this prestigious honor, we will be sending out nomination forms in early August. All nominations must be submitted to the National Office via email to susan@naepc.org.

Promote the AEP Designation!

You worked hard to obtain this professional designation and we ask that you help us to promote the designation by sharing your enthusiasm for the credential with your colleagues who may also be interested in applying for the AEP. We welcome referrals and are happy to provide application qualifications and requirements to them. Furthermore, as an active AEP in good standing you also have the ability to use the NAEPC and AEP logos for business purposes such as your business card and letterhead. Please contact susan@naepc.org to have a copy of the logo e-mailed to you. Finally, it would also be helpful if you encouraged your local councils to highlight designation holders on their respective local council websites.

AEP Consumer Tri-Fold Brochures

So that you may more easily inform clients and potential clients of the benefits of using an estate planning professional who has been awarded the Accredited Estate Planner (AEP) designation, we offer consumer tri-fold brochures which provide background information on the NAEPC as well as details on the strict requirements that must be met before one is awarded this graduate level designation. In a concise, easy-to-use format, you can communicate to your clients and potential clients the professional expertise and highest standards of knowledge, skill, and experience in estate planning that you offer. To order these brochures which are available at a cost of \$.20 per brochure plus actual postage, please visit http://www.naepc.org/aep_current.web and download the order form. Once payment is received, your brochures will be sent to you via US Mail.

Logo Merchandise

License plate frames, 1 for \$10/2 for \$12, and golf shirts in various sizes for \$25 are available as well.

We Need You!

If you are interested in volunteering on one of the many committees of the NAEPC, please let us know by contacting Eleanor M. Spuhler, Administrator, at 866.226.2224 or by email at admin@naepc.org.

2008 Accredited Estate Planner (AEP) Committee

Designation Committee Chairperson

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

Members

*Robert G. Alexander, JD, LL.M., AEP, EPLS, Milwaukee, Wisconsin
Hartman Axley, CLU, ChFC, JD, CFP®, MSFS, RHU, AEP, Denver, Colorado
Kathleen Belmonte, CTFA, AEP, Tampa, Florida
Frank S. Berall, JD, LL.M., AEP, Hartford, Connecticut
Robert E. Burton, CLU, ChFC, AEP, LL.B., San Francisco, California
Walter Lee Davis, Jr., JD, CPA, AEP, EPLS, Johnson City, Tennessee
Gary L. Flotron, MBA, CLU, ChFC, AEP, St. Louis, Missouri
Robert E. Fox, CLU, AEP, Ocala, Florida*

John P. Garniewski, CPA/PFS, CFP®, AEP, Wilmington, Delaware
Pettus C. Gibbons, MEd, CLU, ChFC, LUTCF, AEP, Addison, Texas
Robert P. Goodman, CPA, AEP, Phoenix, Arizona
Leonard H. Neiman, AEP, CLU, ChFC, New York, New York
Paul J. Pantano, CLU, ChFC, AEP, CASL, Pittsburgh, Pennsylvania
Daniel A. Rich, JD, MBA, TO, AEP, Denver, Colorado
Gregory E. Sellers, CPA, AEP, Montgomery, Alabama
T. Phillip Webb, CLU, ChFC, AEP, Daphne, Alabama