

National Association of Estate Planners & Councils
The Association of Choice for Estate Planning Professionals
AEP® ALERT – December 2009

A Word from the Chairperson

Dear Designation Holder:

I am pleased to take this opportunity to introduce myself as the new Chairperson of the AEP® Committee effective December 1st. I would, however, be remiss if I did not begin by thanking Mike Halloran, our new national president, for his tireless efforts on behalf of our designation as the committee chairperson for the past four years. Under his leadership our designation has not only grown – we now have more than 1,400 active designation holders nationwide – but we are regarded as the premiere designation for estate planners and the only one which embraces the team concept of estate planning.

As our numbers increase, the public demand to work with a qualified and credentialed estate planner grows as well. This trend underscores both the importance of the AEP® designation and of our continuing commitment to maintaining the high quality of our program. In addition to our strict application process and our unwavering adherence to the qualifications necessary to obtain the designation, we require all active designation holders to recertify and renew the AEP® designation each year. The 2010 Recertification and Dues Renewal Form will be mailed to you in early to mid January so please complete these forms and return promptly with your dues payment. For more details on the recertification and renewal process, please see the relevant section below.

I also want to thank all of our designation holders who joined us for the NAEPC 47th Annual Conference which was held at the Amelia Island Plantation from November 11 – 13 and who were able to take advantage of our special discount for first-time attendees. I am proud to report that we had representation from almost half of our affiliated local estate planning councils and overall 320 professionals participated in our two-day educational program – which by the way, satisfied all of the estate planning hours for our continuing education requirement. It's not too early to begin thinking about next year and we hope that you will join us at the Hyatt Regency Mission Bay in beautiful San Diego from November 17 – 19, 2010.

In closing, through our designation program we strive to support the mission of the NAEPC to promote the multi-disciplinary approach to estate planning required by the ever-changing and dynamic environment in which we all find ourselves working today. We will continue our efforts to be the association of choice for professionals engaged in the practice of estate planning. If you have any questions or ideas for improvement that you would like to share with us, please feel free to contact me or Susan Austin Carney, AEP® Designation Administrator, at 866.226.2224 or via email at susan@naepc.org.

Wishing you every success in the upcoming New Year, I am,

Sincerely,

Greg

Gregory E. Sellers, CPA, AEP®
Designation Committee Chairperson

Please join me in welcoming our newest designation holders:

Bradley B. Anderson, JD, AEP®	Reno, NV
William M. Andrews, JD, LL.M., AEP®	Santa Rosa, CA
Harry M. Barth, JD, CFP®, ChFC, CLU, AEP®	Orange, CA
Gary R. Beckett, CLU, ChFC, AEP®	Hurricane, WV
Joe E. Belgrade, CFP®, CLU, CASL, ChFC, AEP®	Gainesville, FL
Stuart E. Bloch, JD, AEP®	Boca Raton, FL
Seth J. Buckley, CLU, ChFC, CFP®, MSFS, AEP®	Boston, MA
Thomas K. Carr, Jr., CFP®, AEP®	Claremont, CA
Robert L. Charron, CFP®, AEP®	Nashville, TN
Jeffrey E. Daniher, CFP®, CTFA, CLU, AEP®	Cincinnati, OH
William E. Ebel, CLU, ChFC, MSFS, AEP®	Albuquerque, NM
Evan C. Gansl, JD, LL.M. (Taxation), CLU, ChFC, CASL, AEP®	Syosset, NY
Steven R. Gardiner, CPA, CFP®, CLU, ChFC, AEP®	Milwaukee, WI
Jon M. Gladstone, CLU, CLTC, CFP®, AEP®	Stamford, CT
Ralph H. Heninger, JD, AEP®	Davenport, IA
Blaine A. Jackson, JD, AEP®	Bentonville, AR
Kurtis L. Kidder, JD, ChFC, CFP®, CLU, AEP®	Chicago, IL
Robert L. Kolbert, ChFC, AEP®	Fresno, CA
Richard M. Kunz, CFP®, CTFA, AEP®	Dakota Dunes, SD
Todd C. Landry, CPA, AEP®	Ontario, CA
James E. Larschan, CFP®, AEP®	Palm Beach Gardens, FL
David W. Linehan, CLU, AEP®	Enfield, CT
Mark W. Lupton, CLU, ChFC, CPA, CFP®, CASL, PFS, AEP®	Spokane, WA
Leslie A. McCullough, CFP®, CTFA, AEP®	Boca Raton, FL
Richardson B. McKenzie III, JD, LL.M. (Taxation), AEP®	Montgomery, AL
Kevin J. Miller, JD, AEP®	Lancaster, NY
Kurt T. Mortenson, CFP®, AEP®	Palm Desert, CA
John C. Moshides, CLU, AEP®	Amherst, NY
Deanna L. Muldowney, CPA, AEP®	Destin, FL
Olin Ragsdale, CLU, LUTCF, AEP®	Ft. Worth, TX
Ita M. Rahilly, CPA, AEP®	Newburgh, NY
James K. Say, JD, AEP®	Sterling, IL
George R. Shadie, CLU, AEP®	Wilkes-Barre, PA
Michael D. Sufficool, CFP®, ChFC, CLU, AEP®	Omaha, NE
Hal R. Terr, CPA, PFS, CFP®, AEP®	Princeton, NJ
H. Scott Trotter, ChFC, CLU, AEP®	Newtown Square, PA
Matthew G. Waschull, CTFA, AEP®	Wilmington, DE
Jeffrey H. Winick, JD, AEP®	Tampa, FL

Estate Planning Hall of Fame® Inductees as Accredited Estate Planners (Distinguished)

This annual award is designed to recognize significant and outstanding lifetime achievements and contributions to the practice and profession of estate planning. 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 all the outstanding recipients of this award.

The Recipients for 2009 are:

Ronald D. Aucutt – Attorney

McGuireWoods

A. James Casner – Academic

Posthumous

Virginia F. Coleman – Attorney

Ropes & Gray LLP

Constance J. Fontaine – Academic

The American College

Edward C. Halbach, Jr. – Academic

University of California Berkeley School of Law

Al W. King III – Trust Officer

South Dakota Trust Company, LLC

Edward F. Koren, Jr. – Attorney

Holland + Knight

Lester A. Rosen – Life Insurance

Posthumous

Sanford J. Schlesinger – Attorney

Schlesinger Gannon & Lazetera LLP

Richard M. Weber – Life Insurance

The Ethical Edge, Inc.

AEP® Designation Annual Recertification and Dues Renewal

All designation holders are required to recertify one’s compliance with the requirements necessary to maintain the use of the designation on an annual basis. We operate on a calendar year, so you will receive information about your renewal in January 2010 with a May 1st deadline for compliance. As you may know, you can now recertify and renew electronically. In addition to yearly dues, these requirements are...

- Actively engaged in “estate planning activities” as defined within the AEP application
- Licensed or currently holding the designation(s) noted as your primary discipline in good standing and not subject to any disciplinary investigation
- Satisfactorily completed a minimum of 30 hours of continuing education during the previous 24 months, 15 of which must have been in estate planning
- Maintain membership in an affiliated local council where one is geographically available (50 miles or 60 minutes driving time)
- Satisfied the continuing education requirements of designated professional discipline

- Promptly supply third-party verification or information from which third-party verification may be obtained regarding any of the foregoing if selected for annual audit
- Continuously abide by the NAEPC Code of Ethics
- Adhere to the team concept of estate planning
- Provide authorization so that the NAEPC may contact applicable licensing authorities or designating organizations regarding credentials and continuing education and authorize such authorities, organizations, and providers to respond to such inquiries

Revision to Required Coursework for AEP® Applicants Approved

Applicants for the AEP® designation, who qualify through the coursework requirement, have been required to take two graduate courses through our partner, The American College. In an effort to broaden the opportunity for acceptable coursework, the NAEPC has revised the required coursework criteria to include courses taken as part of a master's or doctoral degree program from an accredited university, college, or college of law. These graduate-level courses may now qualify for the coursework requirement if they are the same length as and of comparable content to those offered by The American College. Applicants must provide a copy of the official transcript and a detailed syllabus of the courses taken and must have earned a grade of "B" or better. Please note that courses earned toward securing one of our six underlying "gateway" designations or degrees do not qualify for this exception. If you have questions or comments concerning the coursework requirements, please be in touch with Susan Austin Carney, Designation Administrator, at 866-226-2224 or susan@naepc.org.

Member Benefits

NAEPC offers a variety of benefits for our members which are below and details about each program or service can be found online at http://www.naepc.org/member_benefits_members.web.

Acquire Direct Marketing
 Docubank (emergency access to healthcare directives),
 Exit Planning for Advisors – A Division of BEI
 CCH, a Wolters Kluwer business
 Civicom
 Estate++: Protecting Estate Planning Documents & Information
 Family Foundation Advisor
 Interactive Legal
 Kettley Publishing Software
 Klark Proposal Software, Inc.
 Konica/Minolta
 National Center for Family Philanthropy
 PESI, LLC – Knowledge and Networking Opportunities
 Retirement Snapshot
Wealth Management Business
 Wealth Transfer Planning
Private Wealth Magazine
Business Week Magazine
Trusts & Estates Magazine
Journal of Taxation of Investments

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.

As an active designation holder 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 Web sites.

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 and required to maintain it. 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.

We Need You!

If you are interested in volunteering on one of the many committees of the NAEPC, please let us know by contacting Susan Austin Carney, Designation Administrator, at 866.226.2224 or by email at susan@naepc.org.

2010 Accredited Estate Planner® (AEP®) Committee

Designation Committee Chairperson

Gregory E. Sellers, CPA, AEP®, Montgomery, Alabama

Members

Robert G. Alexander, JD, LL.M., AEP®, EPLS, Milwaukee, Wisconsin

Hartman Axley, CLU, ChFC, JD, CFP®, MSFS, RHU, AEP®, Denver, Colorado

Kathleen J. Belmonte, CTFA, AEP®, Tampa, Florida

Frank S. Berall, JD, LL.M., AEP®, Hartford, Connecticut

Thomas M. Borchert, CLU, ChFC, LUTCF, AEP®, CLTC, Sioux City, Iowa

Robert E. Burton, LL.B., CLU, ChFC, AEP®, San Francisco, California

Julie A. Buschman, CPA, AEP®, Dallas, Texas

Franklin B. Cornelius, CLU, ChFC, AEP®, Scottsdale, Arizona

M. Eileen Dougherty, CTFA, CFP®, AEP®, Plymouth Meeting, Pennsylvania

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

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

R. Mark Kirkpatrick, JD, EPLS, AEP®, Mobile, Alabama

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

Claire S. Weaver, CPA, CSEP, AEP®, York, Pennsylvania

Nancy H. Weingard, CFP®, AEP®, Boca Raton, Florida