National Association of Estate Planners & Councils

The Association of Choice for Estate Planning Professionals

AEP® ALERT – March 2010

FREE webinar for NAEPC members!

Roth IRA Conversions – The Critical Issues; Advice from America's Leading Experts
March 17, 2010 - 2:00pm ET / 11:00am PT - Duration: 90 Minutes

For the first time since the 1998 introduction of the Roth IRA, the playing field has opened up and the restrictions once limiting Roth IRA conversions to taxpayers with modified adjusted gross income (MAGI) under $100,000 have been lifted. Clients who were previously ineligible to convert will begin looking to their trusted advisors to counsel them regarding the potential benefits of a Roth IRA conversion. Whether you are a tax professional, estate planner or financial advisor, it is important that you are well-equipped to effectively advise clients regarding Roth IRA conversions. Industry experts Sid Kess, Chris Hoyt, Mike Jones, Bob Keebler and Barry Picker will provide you with valuable insight regarding the strategic factors and tactical considerations that drive Roth IRA conversion planning.

This webinar will cover a number of conversion topics, including:

- Who should convert to a Roth IRA and who should not
- Re-characterizations
- Asset protection concerns
- Beneficiary designation forms
- Post-death, tax-free Roth distributions

A Word from the Chairperson

Dear Designation Holder:

I am pleased to report that we now have over 1,400 active designation holders nationwide with a growth percentage rate last year of approximately 8%. We are especially pleased to be growing while many other professional designations are experiencing a decline in membership. This growth underscores the importance of working with a qualified and credentialed estate planner who commits to obtaining and maintaining the necessary expertise in this dynamic field. Furthermore, the AEP® designation is regarded as the premiere designation for estate planners and the only one which embraces the team concept of estate planning. Please be assured that we will continue to work hard to maintain the high quality of our program and its designees.

Toward this end, each year active designees must recertify compliance with the requirements necessary to maintain the use of the AEP® designation and to continue to be listed in our searchable online database of qualified estate planners. The 2010 Recertification and Dues Renewal notices were sent via US Mail to all active designation holders with a May 3, 2010 deadline for submission. You can recertify and renew either by completing and returning the hardcopy form or online at https://members.naepc.org/renewalaep.asp.
Please take a moment to recertify and renew today to avoid the $25 late compliance penalty.

It's not too early to begin planning for the NAEPC's 47th Annual Conference which will be held this year at the Hyatt Regency Mission Bay Spa & Marina in beautiful San Diego from November 17th – November 19th. Don't miss this excellent educational and networking opportunity where you can earn **all of your estate planning continuing education requirements** for your AEP® designation. For more details about the conference, please visit out Web site at http://www.naepc.org/convention.web.

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.

Sincerely,

Greg

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

Please join me in welcoming our newest designees:

Donald. G. Armstrong, , CLU®, ChFC®, CFP®, MSFS, AEP®
Barbara A. Bombaci, JD, CLU®, CFP®, AEP®
Christopher M. Brown, JD, AEP®
Donald B. Cooper, CLU®, ChFC®, CFP®, AEP®
Christopher K. Dorton, CLU®, ChFC®, AEP®
William J. Farber, CFP®, AEP®
Timothy J. Harrison, CIMA, CFP®, ChFC®, CLU®, AEP®
H. Kent Heise, CLU®, ChFC®, AEP®
Leslie G. Johnson, MBA, CFP®, ChFC®, CLU®, AEP®
David A. Jones, CFP®, CTFA, AEP®
Michael B. McGill, CLU®, ChFC®, AEP®
Stephen D. Moore, CTFA, AEP®
Cornelius Phillip Pigott, CFP®, MSFS, ChFC®, CRA, CLU®, AEP®
Roger H. Ridley, JD, AEP®
Gail Waldman, CFP®, AEP®
J. Robert Wheat, Jr., CPA, JD, AEP®

Member Benefits

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

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. Also, designation requirements and qualifications along with a downloadable application form can be found at http://www.naepc.org/aep_application.web.

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.