

**National Association of Estate Planners & Councils**  
*The Association of Choice for Estate Planning Professionals*

***AEP® ALERT – May/June 2010***

**It's Hot Outside So Earn AEP® CE Hours This Summer without Leaving the Comfort of Your Office!**

To register, visit <https://interactivelegal.webex.com> and enter your member discount code found below for the NAPEC member pricing of \$85 per session! These webinars qualify for your estate planning continuing education requirement so register today!

**July 30, 2010 – 1:00pm – 2:00 pm ET**

**The Critical Importance of Tax Apportionment Clauses with Jonathan G. Blattmachr, JD, AEP® (Distinguished)**

This program will focus on why tax apportionment clauses are the most important provisions in the will or trust, what tax apportionment clauses accomplish, dangers in using tax apportionment clauses, how to draft tax apportionment clauses and how tax apportionment clauses are different from abatement provisions.

**Discount Code ADUqaduX**

**August 11, 2010, 12:30 pm – 2:00 pm ET**

**Structuring and Administering Effective Family Limited Partnerships with Jonathan G. Blattmachr, JD, AEP® (Distinguished) and Professor Mitchell M. Gans**

This webinar will address recent FLP developments, structuring an FLP to establish a significant and legitimate non-estate tax reason for its formation, structuring the partnership without risk of making a taxable gift or recognizing gain or other income, administering a partnership to avoid IRS contention that the underlying partnership assets are included in the partner's estate, sales and other dispositions of limited partnership units without gain and estate tax inclusion and special detriments and opportunities for married couples using family partnership. **Discount Code suaLaluR**

**August 25, 2010 – 1:00pm – 2:00 pm ET**

**Estate Planning for the Family Business Owner with Jonathan G. Blattmachr, JD, AEP® (Distinguished)**

details to follow

**Discount Code noHeQaBA**

**September 22, 2010, 1:00 pm – 2:00 pm ET**

**Key Estate Planning & Trust Issues in Uncertain Times with Al W. King, III, JD, LL.M., AEP® (Distinguished)**

Mr. King will address generation skipping trust planning with no GST tax, asset protection planning updates with discretionary trusts, possible SEC registration requirements for family offices and RIAs serving as trustees (including planning alternatives), state income tax updates for trusts, private family trust company updates and a reformation/modification and decanting update. **Discount Code sdtrust1**

***A Word from the Chairperson***

Dear Designation Holder:

I want to begin by thanking you for your continued support of the AEP® designation. We are grateful for the many designation holders who regularly promote the designation as well as actively volunteer as a member of one of the many committees offered by the NAEP. The AEP® Committee continues to work hard to ensure the quality of our program and the acceptance of the designation by states and individual companies.

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.

To this end, each year in July we audit randomly-selected designees to verify compliance with the requirements to maintain the AEP® designation in active status which are: 30 hours of continuing education (15 of which must have been in estate planning) for the prior two calendar years; active membership in an affiliated local estate planning council; and current licensing of the other professional designations held by the designee. If you are one of the designees selected for this audit, please provide a full and timely response.

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](mailto:susan@naepc.org).

Sincerely,

Greg

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

***Please join me in welcoming our newest designees:***

Barbara C. Archer, CFP®, CLU®, AEP®	St. Louis, MO
Don E. Ash, CTFA, AEP®	Rome, GA
Robert J. Baldes, Jr., CLU®, ChFC®, AEP®	Rochester, NY
Michael A. Bass, JD, LL.M., AEP®	Boston, MA
Richard E. Bergeron, CFP®, ChFC®, AEP®	Mansfield, MA
Robert P. Bishop, CLU®, ChFC®, AEP®	Spokane, WA
Sam W. Boone, Jr., JD, AEP®	Gainesville, FL
Garry Browning, CPA, AEP®	Modesto, CA
Timothy Alden Christensen, CPA/PFS, AEP®	Orem, UT
William D. Cunningham, JD, CTFA, AEP®	Houston, TX
Cyrus A. Dolph, IV, JD, AEP®	Norfolk, VA
Mary H. Durie, CFP®, AEP®	Dallas, TX
Gary L. Fleming, Sr., CLU®, ChFC®, AEP®	Sewickley, PA
Michael H. Fliegelman, CLU®, ChFC®, RFC, AEP®	Greenlawn, NY
William E. Ford, III, CLU®, AEP®	Weatherford, TX
A. Frank Goins, CFP®, CTFA, AEP®	Charlotte, NC
Thomas B. Hall, CFP®, AEP®	Rolling Meadows, IL
Victor L. Hess, CPA/PFS, CFP®, AIFA, CFE, AEP®	Marana, AZ
John M. Holten, CLU®, ChFC®, AEP®	Plymouth, MN
Wayne E. Johnson, CFP®, AEP®	West Des Moines, IA
David N. Kass, CPA, Atty, AEP®	Roslyn, NY

Kirkland M. Kelley, JD, AEP®	Norfolk, VA
Jason A. Kiehl, CFP®, AEP®	Houston, TX
Brad M. Kreiner, CFP®, AEP®	Troy, MI
Carl J. Kunhardt, CFP®, CIMA®, AEP®	Dallas, TX
Daniel J. Lauletta, CFP®, ChFC®, CLU®, LUTCF, AEP®	Mayfield Heights, OH
William Kris Lonsinger, CFP®, LUTCF, AEP®	Johnstown, PA
Kenneth J. Masters, CLU®, ChFC®, AEP®	Southborough, MA
Timothy S. McBride, JD, MBA, CFP®, AEP®	Boston, MA
Daniel J. McCleary, CLU®, ChFC®, MSFS, AEP®	Cypress, TX
Michael B. McGill, CLU®, ChFC®, AEP®	Chicago, IL
Tracy L. Miller, CFP®, ChFC®, CLU®, AEP®	Houston, TX
Michael Steven Millman, CFP®, ChFC®, CLU®, AEP®	Emeryville, CA
John E. Muth, JD, CLU®, CFP®, AEP®	Milwaukee, WI
R. Brady Osborne, Jr., JD, AEP®	Boca Raton, FL
Thomas E. Peckham, JD, AEP®	Boston, MA
John D. Pettee, CFP®, CASL, CWS, AEP®	Phoenix, AZ
Michael A. Porter, JD, AEP®	Spearfish, SD
John S. Pugh, CLU®, ChFC®, MSFS, AEP®	Virginia Beach, VA
Mary Ann Quay, CPA, AEP®	Glendora, CA
Peter L. Reiss, JD, LL.M. (taxation), AEP®	Doylestown, PA
Helen H. Reiter, CPA, MST, AEP®	Halifax, VA
Cheryl A. Robertson, CPA, AEP®	Montgomery, AL
J. Howard Rodman, Jr., CFP®, AEP®	Virginia Beach, VA
Mary H. Schmidt, JD, LL.M. (taxation), AEP®	Boston, MA
Joseph P. Seoane, Sr., CLU®, ChFC®, CLTC, AEP®	Slidell, LA
Marc G. Sigel, ChFC®, AEP®	Ft. Lauderdale, FL
Barbara L. Smith, CPA, CVA, AEP®	Virginia Beach, VA
Gregory K. Smith, CTFA, AEP®	Grand Rapids, MI
Paul S. Soule, CLU®, ChFC®, AEP®	Miami, FL
Scott Staples, CFP®, CLU®, AEP®	Sugar Land, TX
Matthew D. Starkey, MSFS, CFP®, CAP, AEP®	Overland Park, KS
Leonard Weiner, JD, AEP®	Houston, TX
Michael B. Welborn, CLU®, ChFC®, CFP®, AEP®	Phoenix, AZ
Brian P. Winfield, Sr., CLU®, AEP®	Virginia Beach, VA
Daniel L. Woehrer, MBA, JD, AEP®	Mt. Calvary, WI

### **AEP® Marketing and Member Benefits Survey**

The AEP® Committee is responsible for maintaining the high standards required to earn this graduate level accreditation and ensuring that designation holders continue to demonstrate the necessary knowledge and skills required to keep this designation in good standing. In this way, we support the mission of the NAEP® which is to promote excellence, professionalism, and the team concept of estate planning among credentialed professionals in the estate planning industry.

At the same time, this committee is dedicated to making sure that our national association meets your needs and expectations as an AEP® designee. We are also interested in developing creative ways to promote the value of our designation. To better accomplish these goals, we are conducting a survey among a small, but representative, sample of designation holders chosen at random from our national membership roster. We are asking for reactions to a number of marketing strategies and enhancements to member benefits, as well as suggestions on how our organization may play a more dynamic role in your day-to-day practice. We will be sharing the results of this survey with you in an upcoming issue so stay tuned!

**Mark Your Calendars Now for the 47<sup>th</sup> Annual Conference – Register Today to Receive the Early Bird Discount and Special Discount Pricing for First-Time AEP® Attendees and New Designation Holders!**

It's not too soon to begin planning for the NAEPC's 47<sup>th</sup> Annual Conference to be held from November 17 – 19 at the Hyatt Regency Mission Bay Spa & Marina in beautiful San Diego, California. Register today to receive both **the early bird discount (valid through August 31, 2010) and the special discount for first-time AEP® attendees and new designation holders awarded the designation after November 1, 2009.** Don't miss this excellent educational and networking opportunity where **you can earn all of your estate planning continuing education hours** necessary to maintain your designation in good standing. For more details about the conference and special discount pricing, please visit our Web site at <http://www.naepc.org/convention.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](http://www.naepc.org/aep_application.web).

**We Need You!**

If you are interested in volunteering on one of the 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](mailto:susan@naepc.org).