

National Association of Estate Planners & Councils
The Association of Choice for Estate Planning Professionals
AEP® ALERT – January/February 2011

A Word from the Chairperson –

Dear Designee:

I am pleased to report that we now have 1,500 active designation holders nationwide with a growth percentage rate last year of approximately 10%. 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 as we seek to promote the designation among consumers and professionals alike. 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 2011 Recertification and Dues Renewal notices were sent via US Mail to all active designation holders with a May 2, 2011 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 48th Annual Conference which will be held this year from November 16th – November 18th at the Marriott Rivercenter in historic San Antonio, Texas. 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 our 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

Technical Corner

Introducing a recently requested feature of THE AEP® Alert. This section is geared to provide our designees with a "Technical Tidbit" that will help you help your clients. We need your participation.

If you have an article, worksheet or flowchart that can fit on one page (usually 1,000 words or less), then we would love to publish you. Contact Susan Austin Carney, AEP® Administrator, to submit your contribution to the "Technical Corner."

In our first edition of the "Technical Corner," we are pleased to feature the Editor of the NAEPC Journal of Estate and Tax Planning, Charlie Douglas, JD, CFP®, AEP® and his recent summary of the new tax law.

Now, on to the knowledge...

With the signing of "The Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010" ("TRA 2010") into law by President Obama on December 17, 2010, clients and their advisors alike are no longer in the dark as to how to plan (at least for the next two years). At long last, one can begin to take some action without fear as to whether the estate tax law will be changed retroactively for 2010 or prospectively for 2011.

While in the weeks and months to come there will surely be much written about TRA 2010, with much greater detail and with further clarity, the following passages underscore some of the more pertinent aspects of TRA 2010, and provide some planning pointers to consider. Read more

<http://www.naepc.org/journal/>

The NAEPC Foundation

As you might have noticed in your dues renewal and recertification packet, the NAEPC Foundation is a 501(c)(3) charitable organization formed to provide information about the multi-disciplinary approach to estate planning for the public and to provide educational opportunities to estate planning professionals. As an AEP®, you directly receive the benefit of the referrals from the foundation and the educational resources. While submitting your dues, please consider a charitable gift to the Foundation to further the educational purpose of the organization. A form for this purpose can be found at http://www.naepc.org/foundation_contribution_designee.pdf.

Explore our New Library of Public Content!

Launched last fall, this resource is available to the entire world with easy to understand information about estate and financial planning found at www.EstatePlanningAnswers.org, along with a link back to the NAEPC [designee search engine](#). Check it out today!

Educational Webinars for Councils & Members sponsored by NAEPC & InterActive Legal

For estate planning professionals serious about staying up-to-date in their area of expertise, our webinar series is not to be missed! Featuring leading national experts as speakers, these programs will promote success through education in estate planning, business planning, elder law, tax law, asset protection and more. This innovative series represents a new way to remain current, take in best practices, and learn about the latest developments in the field - essential for the success of any practitioner or firm. The webinar series is made possible through collaboration between NAEPC and InterActive Legal, an NAEPC Member Benefit Partner that specializes in creating software for attorneys. **Program attendance counts toward Accredited Estate Planner® designation continuing education credit!**

Visit [InterActive Legal](#) to register for any of these exciting programs! You will need to enter a discount code when registering to obtain the NAEPC's member pricing (a \$10 discount off of the regular registration fee of \$105). The code appears when you log in to the secure portion of this site. Please log into our [members-only area](#) for special pricing and ordering links.

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.

Please join us in welcoming our newest designees through December 31, 2010:

Michael A. Abraham, JD, AEP®	Woodland Hills, CA
Charles H. Armstrong, III, CFP®, CLU®, ChFC®, AEP®	Dallas, TX
Lori J. Baker, CPA, CSEP, AEP®	Grand Rapids, MI
James A. Ballerano, Jr., JD, AEP®	Boca Raton, FL
Alexander A. Bove, Jr., JD, LL.M., Solicitor, England & Wales, AEP®	Boston, MA
Richard W. Buhman, JD, LL.M. (taxation), AEP®	Chattanooga, TN
William Harrison Campbell, CLU®, ChFC®, CAP, MSFS, AEP®	Bethesda, MD
Debra A. Cancilla, CTFA, AEP®	Boca Raton, FL
J. Franklin Cape, MSFS, CFP®, ChFC®, CLU®, AEP®	Green Bay, WI
Richard G. Chalifoux, JD, AEP®	Melville, NY
Trevor R. Chuna, CFP®, AEP®	Akron, OH
Edwin C. Drake, CFP®, AEP®	Madison, WI
Janice Epailard, CTFA, AEP®	Mount Dora, FL
Michael A. Fraher, ChFC®, LUTCF, CRPC, AEP®	Orlando, FL
Dianne K. Harris, CTFA, AEP®	Sioux Falls, SD
Kurt C. Hofgard, JD, CLU®, ChFC®, AEP®	Boulder, CO
W. Robert Johnson, CLU®, ChFC®, CFP®, AEP®	Macon, GA
Brian K. Kirby, JD, AEP®	Sioux Falls, SD
David Korte, CPA, MST, AEP®	Grand Rapids, MI
John R. Kuczynski, JD, CTFA, CFP®, AEP®	Tucson, AZ
Robert V. Littner, JD, LL.M., AEP®	Bethlehem, PA
Anchi Liu, CLU®, AEP®	Irvine, CA
Robert E. Maloney, MSFS, AEP®	Holderness, NH
Donald W. Paule, JD, LL.M. (taxation), AEP®	St. Louis, MO
Marc P. Riddell, CPA, CVA, AEP®	West Chester, PA
Jeffery Alan Rozovics, CPA, CFP®, AEP®	Park Ridge, IL
Robert J. Ruelle, CLU®, ChFC®, CASL, MSFS, FLMI, AEP®	Milwaukee, WI
James J. Ruggiero, Jr., JD, AEP®	Paoli, PA
Thomas Seck, JD, LL.M. (taxation), AEP®	Costa Mesa, CA
Martin M. Shenkman, CPA, PFS, MBA, JD, AEP®	Tenafly, NJ
Richard M. Smarg, CLU®, ChFC®, AEP®	Naples, FL
Theresa E. Stading, CPA, CTFA, AEP®	St. Louis, MO
Joel J. Tabin, CLU®, ChFC®, AEP®	Silver Spring, MD
Henry B. Thomas, CLU®, ChFC®, AEP®	Baltimore, MD
George Warner, CFP®, CEP, RFC, AEP®	Rockwall, TX

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.