

# How Can An AEP® Professional Help Me?

- Offer advice and help you prepare a personalized estate plan
- Recommend planning strategies to build and preserve your wealth
- Explain all of the complicated estate, tax, and personal planning issues associated with your specific needs
- Coordinate the services from all of your professional advisors or refer you to those who will help you meet your objectives
- Provide the peace of mind that your needs are taken into account and that your wishes will be followed in the future

The Accredited Estate Planner® designation is administered and maintained by the National Association of Estate Planners & Councils. Founded in 1962, the association's core belief is that the client is best served by a team approach to estate planning, involving attorneys, accountants, trust officers, insurance and financial planners, and other qualified professionals.



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**IT'S NEVER TOO LATE TO  
PLAN YOUR ESTATE**

**National Association of  
Estate Planners & Councils**

**AEP®  
ACCREDITED  
ESTATE  
PLANNER®**



*Your  
Estate Planning Team...  
At Work For You*



# Experienced

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Every AEP® designee is licensed, practices within the field, has proven experience, and is recognized by his or her peers as having a strong professional reputation.

An AEP® professional is required to obtain a

*Do you know?*

Without a written estate planning document, the laws in the state in which you reside determine who receives your assets at death.

significant amount of continuing education yearly, remain current with their licensing organizations, and certify loyalty to their clients and the team approach

to estate planning.

## HIGHEST PROFESSIONAL STANDARDS

# Committed

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## DEDICATION COLLABORATION

Your AEP® designee is committed to you and your unique situation and understands that each estate plan is different and must be handled with thoughtful consideration.

An AEP® professional will work with you to develop a strategy that will help you achieve financial security during your lifetime and facilitate the intended transfer of your assets at death, while taking into consideration your unique circumstances and the potential costs of alternative ways to achieve your goals.



# Ethical

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As a member of the National Association of Estate Planners & Councils, each AEP® professional recognizes the importance of adhering to a code of ethics that emphasizes a team approach to estate

*Do you know?*

Laws (and your circumstances) can change. An estate plan needs to be reviewed every now and then to make sure it isn't outdated.

planning. You may rely upon the competency, knowledge, professionalism, integrity, objectivity, and responsibility of each person qualifying as a candidate for certification, as well as those who are currently certified.

## BENEFIT

From the knowledge of a team

## PROTECT

What you've worked so hard to build