



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

ACCREDITED ESTATE PLANNER® (AEP®) DESIGNATION CONTINUING EDUCATION REQUIREMENTS

All active designation holders, regardless of state or underlying designation continuing education requirements, must satisfy a minimum of thirty (30) hours of continuing education every two years, of which at least fifteen (15) hours MUST have been in estate planning-related content. Please refer to the definition of estate planning established by the NAEPC which can be found at http://www.naepc.org/estate_planners.web for guidance in determining qualifying subject matter for the estate planning portion of the overall requirement.

The NAEPC verifies compliance with this requirement on an annual basis as part of our recertification and dues renewal process necessary to maintain the AEP® designation in active status. The two-year time period refers to the two (2) calendar years immediately preceding the recertification cycle which begins in January of each year. Also, the NAEPC conducts an annual random audit where selected designees must certify compliance by submitting appropriate continuing education documentation, among other requirements, to maintain the designation in active status and good standing.

General Requirements

- Courses or programs that qualify for the AEP® designation continuing education requirement do NOT require advance approval
- Courses or programs taken for credit used to satisfy the requirements of another professional designation qualify for the 15 general hours and may qualify for the 15 in estate planning depending on the topic and coverage
- One credit (1) hour is composed of fifty (50) minutes of eligible programming
- Credit will be accepted in quarter hour increments once the fifty (50) minute minimum has been reached
- "Question & Answer" periods qualify for course credit

Estate Planning Council Programs and Robert G. Alexander Webinar Series Requirements

- Any meeting of an affiliated local estate planning council that contains educational content and is fifty (50) minutes in length will qualify as one (1) credit hour; meetings lasting longer than fifty (50) minutes will qualify for credit on the quarter-hour increment basis
- Participation in the **NAEPC Robert G. Alexander** Webinar Series qualifies as one (1) hour of continuing education for the AEP® designation, whether the program is viewed live or on-demand; a certification of participation is available to attendees; for more information visit <http://www.naepc.org/events/webinar>
- Meetings of local estate planning councils that are NOT affiliated with the NAEPC will qualify for continuing education credit based on the fifty (50) minute credit hour with additional time accepted in quarter hour increments
- Meetings of affiliated local councils that do NOT contain educational content related to the profession will NOT qualify for continuing education credit

Record Retention

- Meeting or program date
- Time – beginning and ending
- Topic
- Speaker name
- Name of hosting council or other organization
- Certificate of completion where available