



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

AT-LARGE MEMBERSHIP INFORMATION

At-Large membership is available to those:

- a) who are actively and substantially engaged in the estate planning process, and
- b) for whom membership in an affiliated local council is not available*, and
- c) who hold one or more of the qualifying professional designations or credentials required to become an Accredited Estate Planner® designee.

APPLICATION

This application cannot be used to apply for the Accredited Estate Planner® Designation.

Name _____

Date of Birth _____

Professional Designation(s) / Degree(s) _____

Name of Firm or Organization _____

Title _____

Business Address _____

City _____ State _____ Zip _____

Telephone Number _____ Cell Number _____

Email Address _____

Website Address for listing on NAEPC Website _____

Home Address _____

City _____ State _____ Zip _____

Home Telephone Number _____

Alternate Email Address _____

My primary discipline is:

_____ legal

_____ accounting

_____ insurance / financial planning

_____ philanthropy

_____ trust services



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EXPERIENCE REQUIREMENT

I devote a minimum of one-third of my professional time to the estate planning activities based on the [NAEPC definition of estate planning](#).

Current Year _____ % Last Year _____ %

ESTATE PLANNING COUNCIL MEMBERSHIP

Please explain why membership in an affiliated local council is not available to you.

**Unavailability of council membership may be caused by geographical location (within 50 miles or 60 minutes driving time); limits on the number of members per discipline; the council being currently unaffiliated with NAEPC; or other criteria that prevent one from membership. If affiliated local estate planning council membership is not available for any of the foregoing reasons, one may maintain At-Large membership in NAEPC until such time as they can become a member of an affiliated local estate planning council. It is your responsibility to reassess the availability of a local council on an annual basis.*

> [See a list of affiliated local councils by state](#)

CREDENTIAL REQUIREMENT (please include all that apply)

- | | |
|---|--|
| _____ CPA Certificate Number | _____ CTFA Identification Number |
| _____ State Bar License Number | _____ CPWA® Identification Number |
| _____ CLU® Student Identification Number | _____ CAP® Student Identification Number |
| _____ ChFC® Student Identification Number | _____ CSPG Identification Number |
| _____ CFP® Identification Number | _____ MSFS Student Identification Number |
| _____ CFA Charter Number | _____ MST Student Identification Number |

PAYMENT

Make check payable to NAEPC and mail to the address at the top of the page or pay with VISA / MC / AMEX and submit via mail or fax.

Card Number: _____ Exp. Date: _____

Signature: _____ Amount: _____

**for your safety, please do not email a credit card number*

VERIFICATION

I verify that all of the information I have provided in this application is true and correct and understand that I must reassess the availability of affiliated local council membership prior to each renewal. Furthermore, I understand that initial membership and its continuation are subject to criteria established and administered by the NAEPC board of directors.

Signature

Date