

2018 Estate Planning Hall of Fame



Hartman Axley earned both his BA and JD degrees from the University of Wisconsin in Madison and has been actively engaged in the profession of estate planning since passing the bar in 1956 when he joined the law firm of Holland & Hart in Denver, Colorado, as an estate planning specialist. A few years later, he found what was to become his life's work and passion when he accepted a position with the State Mutual Life Insurance Company (later to become the Colorado Associates of America Finance) in 1958 until 2003.

In 1962, Hart earned the CLU® designation through The American College followed by the ChFC® designation and the Master of Science in Financial Services. In 1968, Hart met Fred Rozelle the immediate past president of the NAEPC and there began a professional relationship which has spanned the decades. In 1970, Hart designed the NAEPC logo which is still in use today: a key with four icons representing the professional disciplines recognized by the organization – a quill for accountants; scales of justice for attorneys; crossed keys for trust officers; and a scroll for insurance and financial planners. Hart served as the president of the NAEPC from 1974 to 1975 and it was during his tenure that the professional designation that has become known as the Accredited Estate Planner® (AEP®) was first proposed. It experienced a rather lengthy infancy but when fully established, Hart was only the sixth professional in the country to earn the AEP® designation in 1990. In 1992, he began serving on the oversight committee for the designation program and continues as an active member today.

In the intervening years, Hart has served in many leadership roles in both professional and civic organizations locally and nationally. He has been a member of the Colorado Ethics in Business Alliance Board since 1995, serving as vice president since 2001. He is a member of the American Bar Association Real Property, Probate and Trust section and the American Society of Chartered Life Underwriter and Chartered Financial Consultant serving on the board of directors for the Rocky Mountain board of directors and its president from 1989 to 1990. He is member of the National Association of Insurance and Financial Advisors where he qualified for the Million Dollar Round Table from 1970 to 1985.

In 2004, Hart was appointed a lifetime Emeritus Director of the NAEPC and currently serves in this capacity. This was a special year indeed as the NAEPC established the Hartman Axley Lifetime Service Award with Hart as the first recipient. Since that time, thirteen other estate planning professionals who have dedicated many years of service both to the profession and the NAEPC have been recognized as recipients of this honor.