



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Association of Estate Planners & Councils Committee Volunteer Application

NAME _____

Primary Professional Discipline: ___Attorney ___Accountant (CPA) ___Financial Planner (CFP® / ChFC®)
___Life Insurance Professional (CLU®) ___Trust Officer

Designation(s) held ___AEP® ___EPLS ___CFP® ___ChFC® ___CLU® ___CPA ___JD ___CTFA

Please List Other Designation and/or Degrees _____

FIRM/COMPANY _____

ADDRESS _____

TELEPHONE (Business) _____ (Cellular) _____

Email _____

I am a member of the _____ Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held ___Yes ___No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

Committee Interest (check all that apply)

___Accredited Estate Planner® Designation (meets monthly on the 4th Monday at 2:00 pm ET)
Responsibilities: designation program maintenance & growth, must be a current designee to participate

___Annual NAEPC Advanced Estate Planning Strategies Conference (meets monthly on the 4th Monday at 11:00 am ET)
Responsibilities: site selection, program development, fundraising for upcoming annual conference & general event policy

___Council Relations (meets monthly on the 4th Thursday at 11:00 am ET for approximately 30 minutes)
Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption

___Multi-Disciplinary Teaming (meets quarterly on the 2nd Thursday at 2:00 pm ET)
Responsibilities: oversight of projects & materials related to the team concept of estate planning

___Publications (meets quarterly on the 4th Tuesday at 2:00 pm ET)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning

___Robert G. Alexander Webinar Series (meets six times per year, typically on the 3rd Thursday at 2:30 pm ET)
Responsibilities: programming and oversight for webinar series

___Website & Technology (meets quarterly on the 3rd Tuesday at 10:30 am ET)
Responsibilities: development of affiliated local website platform, www.naepc.org, oversight of association's social media strategy, and varied committee requests

**committee placement subject to availability and chair approval – meeting dates and times subject to change*