

ABOUT OUR ORGANIZATION



The National Association of Estate Planners & Councils (NAEPC) is a national organization of professional estate planners and affiliated estate planning councils focused on establishing the highest professional and educational standards. NAEPC believes in the team approach to estate planning, involving cross-professional disciplines, to better serve the public's need.

THE ASSOCIATION OF CHOICE FOR ESTATE PLANNING PROFESSIONALS

THE NAEPC MISSION

The National Association of Estate Planners & Councils (NAEPC) will promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education and recognizing those members within who hold the Accredited Estate Planner® (AEP®) designation and Estate Planning Law Specialist (EPLS) certification.

EXCELLENCE IN ESTATE PLANNING

THE ROBERT G. ALEXANDER WEBINAR SERIES



The Robert G. Alexander Webinar Series offers online programs on the 2nd Wednesday of each month at 3:00 pm ET. Each program provides one hour of Accredited Estate Planner® designation credit and offers subject matter in support of our core value, the multi-disciplinary approach to estate planning. Webinars can be watched live or at your leisure and can be purchased singly or for the entire year! Visit www.naepc.org/events/webinar for more information, including on-demand options and the series subscription.

ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE & OTHER EDUCATIONAL PROGRAMMING

NAEPC offers a variety of educational opportunities through the Annual NAEPC Advanced Estate Planning Strategies Conference and various programs hosted by other professional associations. To learn more about the **Annual NAEPC Advanced Estate Planning Strategies Conference** held each November with the best multi-disciplinary continuing education content found within a very economical multi-day program, visit www.naepc.org/conference. Other events can be found at www.naepc.org in the member benefits section by choosing "educational programming".

MEMBER DISCOUNT PROGRAMS

**Programs and services change regularly, check website for most current information.*

ABA Paralegal Program
Acquire Direct Marketing
Advance Choice / Docubank
AdvisorAdit LLC
Ahrens Technologies, LLC & Legal Directives, LLC
Bloomberg BNA
Card Connect
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy, Ltd.
Cloudia Assistant **· NEW ·**
CollectorIQ
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards
Estate Planning Smarts / Pensworth
EstatePlanningBinders.com
Everplans
Everything But The House
Family Business Magazine
Family Wealth Map
Florida Domicile Handbook / Disinherit the IRS
HeirSearch.com
Klark Proposal Software
Lawgic, LLC
Legacy Stories
Legal Binders Now (LBN)
Life Document Organizer Kit by The Smead Manufacturing Company
LINK: Advanced Online Education in Multi-Disciplinary Teaming **· NEW ·**
M Brands Film Inc. (M)
Merrill Anderson Company
My Perfect Will
My Personal DataSafe LLC
NationalUnderwriter.com
Ruby Receptionists **· UPDATED ·**
Sterling Cut Glass
The LastingMatters Organizer
The Ultimate Estate Planner
Trusts & Estates
Washington Institute for Graduate Studies
WealthManagement.com
Yourefolio.com
Zola Creative Media & Legal Vault®

Members of local councils can access the entire list of member benefits at <http://www.naepc.org/membership/benefits>. Those councils that have a website hosted through NAEPC show the entire list of partners on their website. Each location provides a description of each program or service.



The *NAEPC Journal of Estate & Tax Planning* is published quarterly and contains cutting-edge technical information for practitioners. Visit www.naepcjournal.org today and be sure

to join the mailing list to receive information about new issues as they are published. Visit www.NAEPJournal.org to read the most recent issue or subscribe!

BENEFITS AVAILABLE ONLY TO THE ESTATE PLANNING COUNCIL

- Council Nominated AEP® Program
- Leimberg Information Services (LISI) Subscription
- NAEPC Speaker Library Access
- Referral Lists and Documents
- Website Templates at Discounted Fees
- Yearly “No-Charge Speaker” Program
- Yearly Leadership Training at the Annual Conference and Regional Leadership Day Events (when offered)

NAEPC-ADMINISTERED PROFESSIONAL DESIGNATIONS

The **Accredited Estate Planner®** designation is available to professionals in the following disciplines - accounting; insurance and financial planning; legal; philanthropy; and trust services - who hold a gateway credential of CPA, CLU®, ChFC®, CFP®, CPWA®, CFA, MSFS, MST, JD, CAP®, CSPG, or CTFA - and meet stringent qualifications at the time of application and commit to ongoing continuing education and recertification requirements, the AEP® designation helps both clients and colleagues understand your belief in, and dedication to, the team concept of estate planning. To learn more, visit www.NAEP.org/AEP.



Affiliated local estate planning councils have the privilege of utilizing the Council Nominated AEP® program. Information about this program can be obtained by calling the national office.

The Estate Law Specialist Board, Inc., an attorney-run subsidiary of the National Association of Estate Planners & Councils, is the only ABA-accredited program for certification of an attorney as an **Estate Planning Law Specialist**. Attorneys who become Board-certified under this program demonstrate a high level of professionalism and commitment to the concept of specialization. This program is currently the only program, other than certain state bar association programs which are only for residents of their particular states, accredited by the American Bar Association to Board-certify attorneys as Estate Planning Law Specialists.



Learn more about us at www.NAEP.org
& join our LinkedIn Group today!

National Association of Estate Planners & Councils

Programs & Services For Members of Estate Planning Councils

The Association of Choice for Estate Planning Professionals

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