National Association of Estate Planners & Councils

The Association of Choice for Estate Planning Professionals
NAEPC WELCOMES

your council,
a member of the national network
of estate planning professionals!
NAEPC MEMBERS

- 270 Affiliated Local Estate Planning Councils and their 30,000 Individual Members
- 2,000 Active Accredited Estate Planner® Designees (and growing!)
MISSION

The National Association of Estate Planners & Councils 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® designation and Estate Planning Law Specialist certification.
LEADERSHIP

- 21 Officers & Directors Representing 17 States and 24 Affiliated Local Estate Planning Councils

- A Wealth of Non-board Volunteers from Across the Country
MEMBER BENEFITS

- 40+ Multi-Disciplinary Discount Programs Within Various Categories
- Regular Additions & Review
- Accessible at your council’s website with your council user name & password (for sites hosted by NAEPC)
MEMBER BENEFITS

Membership rate of $60 for the
Robert G. Alexander Webinar Series

Informative & educational webinars held monthly on the 2nd Wednesday
3:00 – 4:00 pm ET

www.naepc.org/events/webinar or your council website (if hosted by NAEPC)

Series Subscriptions Available
MEMBER BENEFITS, cont.

- Complimentary Resources
- Discipline-specific Information
- Educational Opportunities
- Marketing / Website Design Services
- Presentation Materials / Office Supplies
- Software
- Subscriptions & Publications
- Other Benefits, Programs & Services
MEMBER BENEFITS, cont.

Flagship Benefits

- Trusts & Estates, $149 Subscription
- LINK: online collaboration-based education
- Many More!
55th Annual NAEPC Advanced Estate Planning Strategies Conference

November 6 -9, 2018
Ft. Lauderdale, FL

Member Discount Available to Members of Affiliated Estate Planning Councils!

Early Bird Discount
Registration Opens April 2018
Annual Advanced Estate Planning Strategies Conference

Experience Excellence in Estate Planning

- 2 ½ Days of Technical Education
- Earn Continuing Education Credit
- Participate in the Exchange of Ideas
- Network with Estate Planning Professionals From Around the Country
Accredited Estate Planner® Designation Program

Awarded by NAEPC to recognized estate planning professionals who meet requirements of education, experience, knowledge, professional reputation, and character.
Accredited Estate Planner® Designation Program, cont.

Credentials Requirement:
Active license or certification as an
- Attorney;
- Accountant;
- Insurance & financial planner;
- Philanthropic advisor; or
- Trust officer –

To those holding one or more of the following credentials – JD, CPA, CLU®, CFP®, CFA, ChFC®, CPWA®, CAP®, CSPG, CTFA, MSFS, or MST.
Why Become an AEP®?

- Recognition as a Professional Dedicated to the Team Concept of Estate Planning
- Demonstrate Special Knowledge and Abilities
- National Referral Program
Accredited Estate Planner® Designation Program, cont.

Requirements for All Applicants

- Gateway Degree or Designation
- Minimum 5 Years of Experience
- Presently & Significantly Engaged in Estate Planning
- Member in Good Standing of your EPC
Accredited Estate Planner® Designation Program, cont.

Requirements for All Applicants, cont.

- Professional References
- Ongoing Commitment to NAEPC Code of Ethics
- Yearly Continuing Education
- Annual Recertification & Dues
- Cooperation with Random Audit, if Selected
Accredited Estate Planner® Designation Program, cont.

Paths to Secure Designation

- **Education**
  - Successful Completion of Graduate Coursework Through The American College or Accredited Business or Law School

- **15-Year Experience Exemption**
Estate Planning Law Specialist Certification

- Offered Through the Estate Law Specialist Board, an ABA-Accredited Subsidiary of NAEPC
- Available to Attorneys with 5 Years or More of Experience Devoting 40% of practice to estate planning
- National Examination
- Yearly Renewal, 5-Year Recertification
ONLINE RESOURCES

- NAEPC Journal of Estate & Tax Planning (www.NAEPCJournal.org)
- Monthly Technical Newsletter Offered by Steve Leimberg
  www.naepc.org/events/newsletter
ASSOCIATION AWARDS & HONORS

Hartman Axley Lifetime Service Award

Awarded to those Highly Active in the Estate Planning Community and Crucial to the Development of NAEPC
Estate Planning Hall of Fame®

Offered in Recognition of Distinguished Service to the Field of Estate Planning
INDUSTRY PARTICIPATION

Founding Member of the Synergy Summit

- Unified Think Tank and Voice of the Leadership of Eight Major Financial and Legal Services Organizations
- www.SynergyPro.org
CALL TO ACTION!

Volunteers Needed!

- Accredited Estate Planner® Designation Committee (Active Designees Only, Please)
- Annual Conference Committee
- Council Relations Committee
- Website & Technology Committee
NEED HELP?

NAEPC
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www.NAEPC.org
Welcome!

We’re glad to have you as a member council!