The ONLY
graduate-level, multi-disciplinary
designation in estate planning

Why Earn the Accredited Estate Planner® Designation?

⇒ Gain a Competitive Edge

⇒ Set Yourself Apart from Your Competition

⇒ Demonstrate Your Knowledge, Skill & Expertise

⇒ Identify Yourself as a Qualified Member of the Estate Planning Team

Earn the Accredited Estate Planner® Designation Today

QUALIFICATIONS

Core Value ·	Commitment to the team concept of estate planning
Credential(s) ·	Active license or certification as an attorney; accountant; insurance professional and financial planner; philanthropic advisor; or trust officer— holding one or more of the following credentials: JD, CPA, CLU®, CFP®, CFA, ChFC®, CPWA®, CAP®, CSPG, CTFA, MSFS, or MST
Reputation & Character ·	Three professional references of differing disciplines
Ethics ·	Declaration to continuously abide by the NAEPC Code of Ethics
Education ·	Completion of two graduate courses from The American College or similar graduate courses through an accredited university, college, or school of law as part of a masters' or doctoral degree program (fifteen+ years of experience in estate planning may exempt one from this requirement)
Experience ·	Minimum five years actively engaged in estate planning
Continuing Education ·	Minimum thirty hours of continuing education with fifteen in estate planning every two years

www.naepc.org/AEP

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