

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 (JD), accountant (CPA), insurance professional and financial planner (CLU®, CFP®, ChFC®), or trust officer (CTFA)
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
Membership ·	Maintain membership in an affiliated estate planning council (when available)

www.naepc.org/AEP