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

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