



National Association of Estate Planners & Councils

1120 Chester Avenue – Suite 470 – Cleveland, Ohio 44114

Accredited Estate Planner® Designation 2015 Annual Recertification Form & Dues Renewal Notice

Recertify and renew online at <https://www.naepc.org/members/renewal>

This form is to be used for Accredited Estate Planner® (AEP®) designees to annually recertify compliance with designation requirements. It also functions as the 2015 dues renewal notice for AEP® and At Large dues (if required).

Both pages must be returned by April 24, 2015 to maintain use of the designation and to avoid the \$25 late compliance penalty.

- Please read, sign and return the original with a \$150 AEP® dues payment and \$80 At Large dues (if appropriate).
- Dues payments will not be processed until NAEPC is in receipt of this sheet, all payments, and a completely executed recertification form.
- Check, VISA, MasterCard & American Express will be accepted.
- If paying by credit card, include information at the bottom of page. Checks payable to “NAEPC” may be mailed to the address at the top of the page.

Both sides of this form must be completed and dues must be paid no later than April 24, 2015 to continue using the AEP® designation and to avoid the \$25 late compliance penalty. Recertifications completed on or after April 25, 2015 are subject to the \$25 fee.

Name: _____

Professional Designation(s): _____

Name of Firm or Organization: _____

Title: _____

Business Address: _____

City, State & Zip: _____

Telephone Number: _____ Fax: _____

E-mail: _____

Web Address for listing on www.naepc.org: _____

Home Address: _____

City, State & Zip: _____

Home Telephone Number: _____ Alternative E-Mail Address: _____

Current Council Affiliation (affiliated w/ NAEPC): _____ Membership Current? ___ Yes ___ No

Additional Affiliated Councils _____

Current Council Affiliation (*not* affiliated w/ NAEPC): _____

Dues Information – \$150 AEP® dues are required. If you are not a member of an affiliated local council because there is no EPC *affiliated with the NAEPC* in the geographic location of your practice (50 miles/60 minutes driving), you must maintain an At Large membership in the NAEPC by paying annual dues of \$80 *in addition* to your \$150 AEP® dues. A current list of affiliated local councils is available on the “Find an Estate Planning Council” portion of www.naepc.org. **Please remember that membership in an affiliated local council is REQUIRED if it is geographically available to you and that you must reassess the availability on an annual basis.**

Charge my VISA/MC/AMEX for 2015 dues: ___ AEP® Only (\$150) ___ AEP® & At Large (\$230) ___ Late Payment Penalty (+\$25)

Card Number _____ Exp. Date _____

Signature _____

The Association of Choice for Estate Planning Professionals

Telephone (866) 226-2224 www.naepc.org admin@naepc.org Facsimile (216) 696-2582

OVER →

2015 Annual Recertification Form



Please complete number 4 below by circling either item (a) and filling in the name of the affiliated local council that you belong to or circling (b) and including the NAEPC At Large dues payment in your remittance. **Please remember that membership in an affiliated local council is REQUIRED to maintain your designation if that membership is geographically available to you (50 miles/60 minutes driving) and that you must reassess availability on an annual basis.** Any question regarding this policy should be directed to the NAEPC office *prior* to completing and returning the renewal.

I, _____, hereby certify that:

- 1) I am presently engaged in “estate planning activities” as defined by the NAEPC;
- 2) I am currently licensed in or currently hold the designation(s) of my primary discipline, the same is/are in good standing and I am not the subject of any current disciplinary investigation;
- 3) I have satisfactorily completed a minimum of 30 hours of continuing education during the previous two years, of which at least 15 have been in estate planning;
- 4) **circle one...**
 - a) I am presently a member in good standing of the affiliated _____ EPC.

OR

- b) There is no EPC affiliated with NAEPC in the geographic location of my practice with available memberships in my discipline and I, therefore, ***maintain At Large membership in the NAEPC*** (dues are \$80/year in addition to \$150 AEP® dues);
- 5) I have currently satisfied the continuing education requirements of my designated professional discipline; and
- 6) I will promptly supply third-party verification or information from which third-party verification may be obtained regarding any of the foregoing, if I am one of the persons randomly selected for audit.

I agree that:

- A) I will continuously abide by the NAEPC Code of Ethics;
- B) I will approach my client relationships with a focus on the team concept of estate planning; and
- C) NAEPC may contact my applicable licensing authorities or designating organizations regarding my credentials and my continuing education providers and I authorize such authorities, organizations, and providers to respond to any inquiry.

SIGNED: _____

DATE: _____

Please return the original and maintain a copy of both sides of this form for your records.

Thank you!