



National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

	2011 San Antonio TX	2010 San Diego CA	2009 Amelia Island FL	2008 Scottsdale AZ	2007 New Orleans LA	2006 Amelia Island FL	2005 Grapevine TX
Attendee Discipline							
CLU/Life Insurance Professional*	41%	43%	34%	12%	11%	9%	10%
ChFC/CFP®*	see below	see below	see below	15%	16%	13%	13%
CPA	14%	8%	9%	20%	19%	20%	16.5%
CTFA/Trust Officer	13%	18%	14%	22%	18%	22%	24%
Attorney	23%	16%	24%	16%	22%	23%	19%
Other/Unidentified	9%	15%	18%	15%	14%	13%	17.5%
Repeat Attendance Statistics							
First Time	54%	54%	60%	69%	55%	60%	61%
2-4 times	34%	38%	30%	23%	36%	26%	29%
5-7 times	5%	5%	3%	3%	4%	13%	3%
8+ times	7%	3%	7%	5%	5%	1%	7%
Geographic Data							
Percentage of total attendees from home state of conference	20%	20%	23%	31%	26%	35%	40%

**Categories combined in 2009 to “insurance and financial planning”.*

*Statistics are based on survey results from each event
and are estimated based on the percentage of respondents.*

The Association of Choice for Estate Planning Professionals