



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Association of Estate Planners & Councils / The NAEPC Foundation

Committee Volunteer Application

NAME _____

Primary Professional Discipline: Attorney Accountant (CPA) Financial Planner (CFP® / ChFC®)
 Life Insurance Professional (CLU®) Trust Officer

Designation(s) held AEP® EPLS CFP® ChFC® CLU® CPA JD CTFA

Please List Other Designation and/or Degrees _____

POSITION _____

FIRM/COMPANY _____

ADDRESS _____

TELEPHONE (Business) _____ (Cellular) _____

Fax _____ E-Mail _____

I am a member of the _____ Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held Yes No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

Committee Interest (check all that apply)

Accredited Estate Planner® Designation (meets monthly on the 1st Friday at 10:30 am ET)

Responsibilities: designation program maintenance & growth

Annual Conference (meets monthly on the 2nd Thursday at 4:00 pm ET)

Responsibilities: site selection, program development, fundraising for upcoming annual conference & general event policy

Council Relations (meets monthly on the 4th Thursday at 11:00 am ET)

Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption

Member Benefits (meets monthly on the 2nd Wednesday at 11:00 am ET)

Responsibilities: review and refer member benefit applications, online speaker's bureau review

The NAEPC Foundation & Related Groups and Committees (meets monthly on the 1st Thursday at 10:30 am ET)

Responsibilities: activities related to professional & public education related to mission

Website & Technology (meets monthly on the 3rd Tuesday at 10:30 am ET)

Responsibilities: development of affiliated local website platform, www.naepc.org and varied committee requests

The Association of Choice for Estate Planning Professionals