

National Association of Estate Planners & Councils

Member Council Resource

Best Practices for Recognizing New & Existing Accredited Estate Planner[®] Designees

Your affiliated local council is a part of the national network of estate planning professionals – over 230 estate planning councils, their 27,000 members, including 1,600+ Accredited Estate Planner[®] (AEP[®]) designees nationwide – all contributing time, effort, and talent to the “*Association of Choice for Estate Planning Professionals.*”

There are several ways to promote awareness of the AEP[®] program locally, and your assistance in doing so is most appreciated!

- Announce new designees at the meeting following council notification of same and present duplicate certificate
- Include mention of new designees and/or designation program on pre-meeting PowerPoint presentation* or during the council’s announcements (see Attachment A for sample slides)
- Add “, AEP[®]” to website member listing and council database
- Make sure nametags note “, AEP[®]” for active designees
- Attach a special “AEP[®]” ribbon** to nametag for active designees at council events
- Include a page in annual meeting program honoring all designees within the council and Distinguished Accredited Estate Planner[®] designees / Estate Planning Hall of Fame[®] entrants from the council (see Attachment B for a sample excerpt from a program book)
- For councils with a website hosted through NAEPC, consider adding a special discipline for Accredited Estate Planner[®] designees

Please call the NAEPC designation administrator with additional questions.

Special thanks to Boston Estate Planning Council for sharing their slides and program book excerpt.

**A sample pre-meeting PowerPoint presentation can be found on the “Referral Lists & Documents” tab of the council section of www.naepc.org.*

***Ribbons can be purchased at cost by calling the national office or through Marco Promotional Products (www.marcopromotionalproducts.com).*

09/05/12

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ATTACHMENT A

Accredited Estate Planner®

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Accredited Estate Planner®


The AEP® designation is conferred upon those in the multiple disciplines of accounting, law, trust administration, insurance and financial planning who exemplify the best qualities of their respective professions and believe in the team concept for estate planning. Nationwide, there are over 1,600 professionals who hold the AEP® designation and in BEPC alone, there are 50 individuals who hold that designation.

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 Virginia F. Coleman, LL.B., AEP® (Distinguished)
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The Association of Choice for Estate Planning Professionals

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ATTACHMENT B

Our BEPC Accredited Estate Planner® ...

As many of you know, the Boston Estate Planning Council is a member of the National Association of Estate Planners & Councils, which has over 230 affiliated local council members who represent approximately 27,000 member professionals. One of the functions of the NAEPC is to administer the Accredited Estate Planner® (AEP®) designation program. The AEP® designation is conferred upon those in the multiple disciplines of accounting, law, trust administration, insurance and financial planning who exemplify the best qualities of their respective professions and believe in the team concept for estate planning. Nationwide, there are over 1,600 professionals who hold the AEP® designation and in BEPC alone, there are 50 individuals who hold that designation.

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