

A Look Inside the  
National Association of  
Estate Planners  
& Councils

# Our Mission

The National Association of Estate Planners & Councils (NAEPC) will promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the Accredited Estate Planner<sup>®</sup> (AEP<sup>®</sup>) designation and Estate Planning Law Specialist (EPLS) certification.

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# What We Do. Simplified.

*Continue the Tradition of the Founding & Primary Mission*

Serve and Support Affiliated Local Estate Planning Councils by Providing Benefits, Resources and Education for the Council and its Members

*Recognize Qualified Multi-Disciplinary Professionals for the Benefit of the Profession & the Communities they Serve*

Administration of the Accredited Estate Planner<sup>®</sup> Designation Program  
Support the Efforts of the Estate Law Specialist Board, Inc.

*Support Initiatives & Provide Resources to Enhance the Profession & Disciplines Within, Members, & the Country*

Commitment to Ongoing and Advanced Professional Education

Maintain High Ethical Standards

Resources Dedicated to Diversity, Equity and Inclusion

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# Our National Network

## A Snapshot of NAEPC by the Numbers



- 275 Affiliated Local Estate Planning Councils



- 30,000 Multi-Disciplinary Council Members
- 2,200 Accredited Estate Planner<sup>®</sup> Designees
- 65 Estate Planning Law Specialist Certificants\*

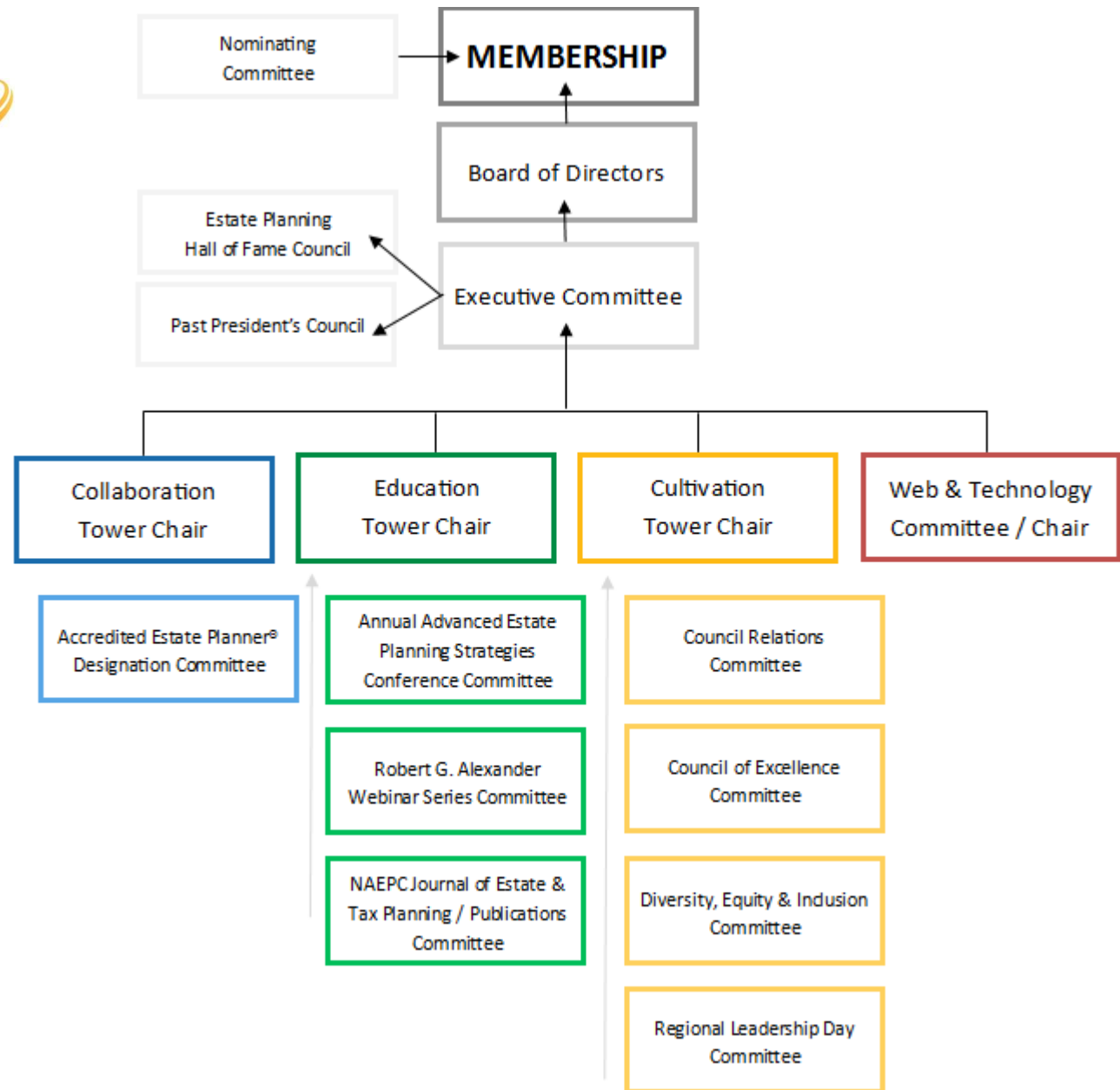
*\*The EPLS Certification is offered by the Estate Law Specialist Board, Inc, a subsidiary of NAEPC. EPLS certificants are not recognized as an official member of NAEPC, but are eligible to take advantage of benefits, program and services.*

# Our National Board of Directors

BOARD OF DIRECTORS EXECUTIVE COMMITTEE



# Our Structure



# Collaboration Tower

It is well-known that the client benefits when a group of multi-disciplinary professionals collaborates on their estate planning needs.

This tower includes any committee, sub-committee or task force that emphasizes multi-disciplinary activities and programs.

Accredited Estate Planner<sup>®</sup>  
Designation Oversight Committee

Multi-Disciplinary Teaming  
Committee Work Group

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# Education Tower

Education helps estate planners stay current so they can offer the latest planning ideas to their clients.

This tower focuses on keeping every estate planning professional on the cutting-edge by providing access to, and education from, the profession's leading experts in various formats.

Annual Advanced Estate Planning  
Strategies Conference Committee

Robert G. Alexander  
Webinar Series Committee

Publications Committee, the  
Home of the  
*NAEPC Journal of  
Estate & Tax Planning*

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# Cultivation Tower

Strong and lasting relationships lead to empowered and well-rounded members and enhanced member satisfaction.

This tower is the home to committees and activities that support the overall culture of the organization and emphasizes relationships between the various members of the association.

Council Relations Committee

Council of Excellence & Regional  
Leadership Day Sub-Committees

Diversity, Equity & Inclusion  
Committee

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# Website & Technology

Technology has truly become the foundation of our daily lives, especially today.

This stand-alone tower manages all projects funneled through or required by the webmaster (an outside vendor to NAEPC), maintains and develops the website platform for NAEPC-hosted council sites and NAEPC.org, create ideas for consideration by other NAEPC committees, discusses ideas requested by NAEPC committees, and oversees the association's social media efforts.

# Snapshot of Council Benefits



## *Leadership Training & Best Practices*

Council Leadership Day  
Regional Leadership Day  
Virtual Events  
LinkedIn Group for Council Leaders

## *Website Solutions*

*Programming Resources*  
“No Charge” Program  
Online Speaker Library  
Information from Other Councils  
Webinars

## *Steve Leimberg’s LISI Service*



## *Council of Excellence Award*

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# Snapshot of Member Benefits

Value Partners

Approximately 40

Member Benefit Providers

TRUSTS &  
ESTATES

Reduced Cost for Programs

Hosted in the

Robert G. Alexander

Webinar Series

Robert G. Alexander


**Webinar  
Series**

Yearly Subscription  
Available!



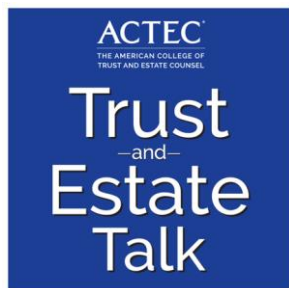
Special Pricing to Attend the  
Annual Advanced Estate  
Planning  
Strategies Conference



 **NAEPC  
Journal**  
of Estate & Tax Planning  
COLLABORATE • EDUCATE • CULTIVATE

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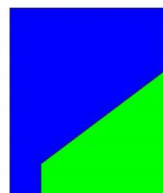
# Sampling of Value Partners



ARCADIA ART CONSULTANCY  
ADVISORS & APPRAISERS



EstatePlanningBinders.com



rocket matter



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# Getting Involved

[Learn More About NAEPC](#)

[Volunteer on Committees](#)

[Attend the Annual NAEPC Advanced Estate Planning Strategies Conference](#)

[Utilize Member Benefits](#)

[Subscribe and Read the \*NAEPC Journal of Estate & Tax Planning\*](#)

Contact the National Office

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Hold the control  
button down when  
clicking if links do  
not open with a  
single click.

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