



# Robert E. Fox, CLU®, AEP® Volunteer Service Award Application

TO: Board of Directors  
National Association of Estate Planners & Councils  
2001 Crocker Rd., Ste. 510  
Westlake, OH 44145

**DEADLINE**  
**FRIDAY, MAY 12, 2023**  
**EMAIL TO: [ELEANOR@NAEPC.ORG](mailto:ELEANOR@NAEPC.ORG)**

*This application should be completed as fully and accurately as possible to assist the board in its review of those nominated to become a recipient of the Robert E. Fox, CLU®, AEP® Volunteer Service Award for 2023.*

*> Please take special care to review the program's [criteria and exclusions](#) prior to completing this application.*

## Nominee's General Information

Full Name \_\_\_\_\_

Primary Professional Discipline (choose only one, please)

- |  |   |
|--|---|
| <input type="checkbox"/> Academia                                  | <input type="checkbox"/> Philanthropic Professional |
| <input type="checkbox"/> Accountant                                | <input type="checkbox"/> Trust Professional         |
| <input type="checkbox"/> Attorney                                  | <input type="checkbox"/> Other: _____               |
| <input type="checkbox"/> Insurance/Financial Planning Professional |   |

Designation(s)/Degree(s) Held

- |                               |                                |                                |                               |
|-------------------------------|--------------------------------|--------------------------------|-------------------------------|
| <input type="checkbox"/> AEP® | <input type="checkbox"/> CFP®  | <input type="checkbox"/> CPA   | <input type="checkbox"/> CTFA |
| <input type="checkbox"/> CAP® | <input type="checkbox"/> ChFC® | <input type="checkbox"/> CPWA® | <input type="checkbox"/> JD   |
| <input type="checkbox"/> CFA  | <input type="checkbox"/> CLU®  | <input type="checkbox"/> CSPG  | <input type="checkbox"/> MSFS |
| <input type="checkbox"/> MST  |                                |                                |                               |

Please List Other Designation and/or Degrees \_\_\_\_\_

Is this Nominee Aware of His/Her/Their Nomination?  Yes  No

Name of Estate Planning Council in Which Nominee is a Member \_\_\_\_\_

## Nominee's Contact Information

Position \_\_\_\_\_

Firm/Company \_\_\_\_\_

Business Street Address \_\_\_\_\_

Business City, State, Zip \_\_\_\_\_

Primary Email \_\_\_\_\_

Link to Nominee's Bio \_\_\_\_\_

## Description of Exceptional Service

*This is a time-sensitive award.* Please help us learn more about this nominee by providing a detailed explanation of his/her/their exceptional service between **January 1, 2022 – December 31, 2022**. Examples of what may be considered exceptional volunteer service follows; supplemental information is welcome.

- Service to a local estate planning council, or members of such council, that reach beyond the regular duties of a volunteer board or committee member.
- Development or the expansion of services, education, or legislation in the fields of philanthropic planning, tax, insurance, financial planning, estate planning, probate and trust law that have an impact on estate planning and the community at large.
- Estate planning related activities within the community.
- Service to NAEPC.

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## Nominator Information

This application is being offered by:

\_\_\_\_ Estate Planning Council  
Council Name \_\_\_\_\_  
\_\_\_\_ Estate Planning Council Board Member

\_\_\_\_ Estate Planning Council Staff Executive /  
Administrator  
\_\_\_\_ NAEPC Board Member  
\_\_\_\_ NAEPC Staff Member

Full Name \_\_\_\_\_

Firm/Company \_\_\_\_\_

Business Street Address \_\_\_\_\_

Business City, State, Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

## Questions

Questions about this application may be directed to:

Eleanor M. Spuhler  
National Association of Estate Planners & Councils  
2001 Crocker Rd., Ste. 510  
Westlake, OH 44145  
866-226-2224 · [eleanor@naepc.org](mailto:eleanor@naepc.org)