

## WHY YOU NEED AN AEP®

An AEP® designee provides quality professional advice and meets the highest standards of knowledge, skill, ethical conduct, and experience in estate planning.

An AEP® is prepared to:

1. Offer advice and create a personalized plan to help accumulate, preserve, and transfer your estate according to your values and objectives.
2. Explain all of the complex estate, tax, and personal planning issues regarding your individual, retirement, and business assets.
3. Provide personal, customized advice with respect to all of your estate and tax planning needs.
4. Encourage the team concept of estate planning and coordinate the services of all of your professional advisors (and refer additional professionals to round out your team) to provide a comprehensive estate plan suited to your needs.

The AEP® designation is the only graduate level multi-disciplinary accreditation that focuses specifically on estate planning. It emphasizes multiple disciplines, including law, accounting, insurance and financial planning, philanthropy, and trust services. The Accredited Estate Planner® designee brings together these diverse areas of practice into one personalized plan to assure your family's financial well-being.

You should have the highest degree of confidence that an AEP® possesses a multi-disciplinary focus, expertise, experience, and a strict code of ethics. These qualities provide you the peace of mind that only comes through expert estate planning services.

For additional information regarding the ACCREDITED ESTATE PLANNER® (AEP®) designation or to locate an AEP® designee near you, contact the National Association of Estate Planners & Councils.



NAEPC

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[www.naepc.org/AEP](http://www.naepc.org/AEP)

*The Association of Choice  
for Estate Planning Professionals*

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Estate Planners & Councils

*Revised 2017*

**MAKE SURE YOUR  
ESTATE PLANNING ADVISOR  
HAS THE KNOWLEDGE, SKILL, EXPERIENCE, AND  
HIGH ETHICAL STANDARDS TO HELP YOU MAKE THE  
RIGHT CHOICES**

**DEPEND ON THE COMPREHENSIVE KNOWLEDGE  
AND EXPERIENCE OF AN**

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**ACCREDITED ESTATE PLANNER®  
(AEP®) DESIGNEE**

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The National Association of Estate Planners & Councils (NAEPC) is a national non-profit organization of affiliated estate planning councils and their members focused on establishing and monitoring the highest professional and educational standards in the estate planning profession.

With roots dating back to 1931, the NAEPC currently consists of approximately 275 local estate planning councils and their 29,000 members throughout the United States. Its mission is to promote excellence in estate planning.

The NAEPC promotes the team concept of estate planning by invoking the skills of each of its recognized professional disciplines (accounting, insurance and financial planning, law, philanthropy, and trust services) in order to better serve the public's need for estate planning.

In an effort to encourage the recognition and acceptance of estate planning as a specialty, the NAEPC established the AEP® designation, available to credentialed individuals in each of the following disciplines:

- Accounting (CPA)
- Insurance & Financial Planning (CLU®/ChFC®/CFP®/CFA/CPWA®/MSFS/MST\*)
- Law (JD)
- Philanthropy (CAP®\*/ CSPG)
- Trust Services (CTFA)

\* Special requirements must be met - please contact the national office for details.

[www.NAEP.org/AEP](http://www.NAEP.org/AEP)

The AEP® designation program is overseen by a national committee consisting of members of the NAEPC board of directors, former board members, and active designees, all of whom hold the AEP® designation. They are responsible for determining eligibility requirements for the designation and insuring that designation holders continue to maintain the necessary knowledge, skill, experience, and ethical standards for their ongoing certification.

#### REQUIREMENTS

The NAEPC has set high standards for eligibility with respect to education and comprehensive experience in estate planning. Accordingly, applicants and designees must meet and maintain all of the following:

- ▶ **Credentials.** An AEP® must be actively licensed or certified as an attorney; accountant; insurance and financial planner; philanthropic advisor; or trust officer.
- ▶ **Estate Planning Activities.** An AEP® must have acquired extensive knowledge as an estate planner devoting at least a third of one's professional time to estate planning activities, including the accumulation, preservation, and transfer of assets through proper planning.
- ▶ **Experience.** An AEP® must either: (1) have a minimum of five years of professional experience as an estate planner and have successfully completed two graduate courses in estate planning from The American College or from another accredited graduate program as part of a master's or doctoral degree; or (2) have a minimum of fifteen years of professional experience as an estate planning practitioner.

▶ **Affiliation.** An AEP® must continuously maintain membership in an affiliated estate planning council where one is available.

▶ **Professional Reputation.** An AEP® must remain in good standing within his or her respective professional organization(s) and license(s), and must be highly recommended by three unrelated, credentialed professionals practicing within the disciplines recognized by the NAEPC.

▶ **Commitment to Ethics.** An AEP® must sign a declaration agreeing to continuously abide by the NAEPC Code of Ethics.

▶ **Dedication to the Team Concept.** An AEP® must be committed to the team concept of estate planning.

▶ **Continuing Education.** An AEP® must complete at least 30 credits of continuing education (15 of which must be in estate planning), every two years and certify this to the NAEPC on an annual basis. This requirement insures that designation holders maintain a high level of expertise and remain current with the latest developments in estate planning.

▶ **Dedication to the Client.** An AEP® must remain dedicated and loyal to his or her clients.

▶ **Annual Audit.** Each year an audit of randomly-selected active designees is conducted to verify compliance with the requirements of continuing education, council affiliation, current licensing, and active practice.

*Clients Feel More Secure When Working  
with an Advisor Who Holds  
the AEP® Designation*