



## ACCREDITED ESTATE PLANNER® (AEP®) DESIGNATION CONTINUING EDUCATION REQUIREMENTS

NAEPC considers continuing education to be an important component of ongoing professional development. All active designation holders, regardless of the continuing education requirements of their state or underlying designation, must satisfy a minimum of thirty (30) hours of continuing education every two years, of which at least fifteen (15) hours must have been in content related to the practice of estate planning. Please refer to the definition of estate planning established by the NAEPC on the page that follows for guidance in determining qualifying subject matter for the estate planning portion of the overall requirement.

Designees are self-reporting; the NAEPC verifies compliance with this requirement on an annual basis as part of the recertification and dues renewal process necessary to maintain the AEP® designation in active status. The two-year time period refers to the two (2) calendar years immediately preceding the recertification cycle which begins in January of each year. NAEPC also conducts an annual random audit where selected designees must certify compliance by submitting appropriate continuing education documentation, among other requirements, to maintain the designation in active status and good standing.

### Basic Requirements

- Courses do not require advance approval
- Types of courses that may be taken for credit include:
  - in-person meetings, conferences, and events
  - virtual/distance learning programs (including live or on-demand / pre-recorded sessions)
  - hybrid programs where a portion of the audience is in-person and others are participating virtually
- One credit (1) hour is composed of fifty (50) minutes of eligible programming
- Credit will be accepted in quarter hour increments once the fifty (50) minute minimum has been reached
- “Question & Answer” periods qualify for course credit

### NAEPC / Council-Provided Programs: Estate Planning Council Programs, Robert G. Alexander Webinar Series & the Annual NAEPC Advanced Estate Planning Strategies Conference

- Any meeting of an affiliated or unaffiliated local estate planning council that contains educational content related to the practice of estate planning\* and is fifty (50) minutes in length will qualify as one (1) credit hour; meetings lasting longer than fifty (50) minutes will qualify for credit on the quarter-hour increment basis
- Participation in a webinar hosted as part of the NAEPC Robert G. Alexander Webinar Series qualifies as one (1) credit hour for the AEP® designation, whether the program is viewed live or on-demand
- Attendance and participation in the [NAEPC Annual Advanced Estate Planning Strategies Conference](#) qualifies for approximately fifteen (15) credit hours

*\*Meetings of affiliated or unaffiliated local councils that do not contain educational content related to the practice of estate planning do not qualify for continuing education credit.*

### Other Programs

- In-person meetings, conferences, events, and virtual/distance learning programs (including live or on-demand / pre-recorded sessions) taken for credit used to satisfy the requirements of another professional designation qualify for AEP® credit

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## Record Retention

Designees should maintain a record of the following for each course taken for credit:

- Meeting or program date
- Starting and ending time
- Topic
- Speaker name and designations
- Name of hosting council or other organization
- Certificate of completion (if provided by the event host)

*If chosen for the annual random audit, designees may also submit a print out from the organization or governing body awarding credit (example: CFP Board).*

## NAEPC Definition of Estate Planning (revised 11/2016)

Estate planning encompasses the purposeful accumulation, conservation, preservation, and transfer of an estate by establishing clear goals and objectives through planning and implementation of an estate plan. The overall purpose of the estate planning process is to develop a plan that will promote and achieve the estate planning goals, values, and objectives of individuals and their families and to carry out their charitable goals, if any. Estate planning has come to include and mean lifetime planning that leads to creation, conservation, and transfer of assets. Estate planning should also facilitate the intended and orderly transfer of property at death, taking into consideration the family unit and the potential costs of different methods.

Estate planning activities could include the following functions appropriate to the applicant's respective discipline(s):

- Administering or planning estates and trusts
- Analyzing existing life insurance coverage for continuing relevance
- Analyzing proposed transactions for estate and gift tax implications
- Attending Estate Planning Council Meetings and Other Estate Planning Educational Events
- Charitable/gifting planning
- Designing estate plans
- Designing Qualified and Non-Qualified Retirement Plans
- Developing strategies to minimize potential estate and gift taxes, including generation skipping taxes
- Developing programs to conserve assets during lifetime and at death
- Drafting estate planning documents
- Facilitating, conducting, teaching, and/or moderating seminars, workshops, and continuing education programs in estate planning; estate, gift and/or generation-skipping taxes; or business succession planning that would qualify for the continuing education requirement to maintain the AEP® designation in active status
- Leading clients through a discovery process to determine the ultimate purpose they want their wealth to accomplish for them, their families and the institutions and causes they care about most.
- Life Settlements of Life Insurance Policies
- Preparing estate and gift tax returns, including generation skipping tax returns
- Preparing fiduciary accountings
- Preparing fiduciary income tax returns
- Proposing life insurance solutions consistent with estate plans
- Retirement distribution planning
- Succession planning
- Teaching courses in estate planning; estate, gift and/or generation-skipping taxes; or business succession planning by a full time professor at a college, university or school of law

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