National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

National Association of Estate Planners & Councils
Committee Volunteer Application

NAME_____

Primary Professional Discipline: ___Attorney ___Accountant ___Insurance/Financial Planning ___Trust ___Philanthropy

Designation(s) held ___AEP® _____EPLS ___CFP® ___ChFC® ___CLU® ___CPA ___JD ___CTFA

Please List Other Designation and/or Degrees _____

FIRM/COMPANY_____

ADDRESS_____

_____

TELEPHONE (Business)_____(Cellular)_____

Email_____

I am a member of the _____Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held ___Yes ___No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

_____
_____

Committee Interest (check all that apply)

_____Accredited Estate Planner® Designation *(*meets monthly on the 3rd Monday at 2:00 pm ET)
Responsibilities: designation program maintenance & growth, must be a current designee

_____Annual Conference (meets monthly on the 4th Monday at 4:00 pm ET)
Responsibilities: program development, fundraising for upcoming annual conference & general event policy

_____Council Relations (meets monthly on the 4th Thursday at 11:00 am ET for approximately 30 minutes)
Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption

_____ Multi-Disciplinary Teaming (meets approximately every other month on the 2nd Thursday at 2:00 pm ET)
Responsibilities: oversight of projects & materials related to the team concept of estate planning

_____ Publications (meets quarterly, schedule changes each year)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning

_____Robert G. Alexander Webinar Series (meets approximately 5 times per year on the 3rd Thursday at 2:30 pm ET)
Responsibilities: programming and oversight for webinar series

_____Website & Technology (meets quarterly on the 3rd Tuesday at 10:30 am ET)
Responsibilities: development of affiliated local website solutions, www.naepc.org, oversight of association's social media strategy, and varied committee requests

**committee placement subject to availability and chair approval – meeting dates and times subject to change*