



COMMITTEE VOLUNTEER APPLICATION

NAME \_\_\_\_\_

Primary Professional Discipline: \_\_\_Attorney \_\_\_Accountant \_\_\_Insurance/Financial Planning
\_\_\_Trust \_\_\_Philanthropy \_\_\_Other: \_\_\_\_\_

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: \_\_\_\_\_

Are you interested in submitting a piece for the NAEPC Journal of Estate & Tax Planning? \_\_\_Yes \_\_\_No

Committee Interest (check all that apply)

- Accredited Estate Planner\* Designation (meets regularly on the 2nd 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
Diversity, Equity & Inclusion (meets four to six times per year, schedule changes each year)
Responsibilities: cultivate a foundation for growth in the number and type of diverse voices within the association's leadership, membership, and programming, as well as that of the councils affiliated with NAEPC, the profession as a whole, and various disciplines represented within
Publications (meets quarterly, schedule changes each year)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning
Robert G. Alexander Webinar Series (meets 6-8 times per year most often on the 2nd Tuesday at 3:00 pm ET)
Responsibilities: programming and oversight for webinar series
Website & Technology (meets approximately, dates vary)
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 leadership approval. Available committees, meeting dates and times subject to change.

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS