



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 _____

Complete Address _____

Telephone (Business) _____ (Cell) _____

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 (you must be a designee)
- Annual Conference (meets monthly on the 4th Monday at 4:00 pm ET)
Responsibilities: site selection, program development, fundraising & general event policy and procedure
- Council Relations (meets monthly on the 4th Thursday at 11:00 am ET for approximately 30 minutes)
Responsibilities: affiliated local council retention & growth through monthly phone and email contact with councils within a territory structure, serve as the primary liaison between councils in a territory and NAEPC, connect councils within a single territory, explain benefits, programs & services for council consumption to councils in a territory
- Publications (schedule changes each year, up to six meetings)
Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning, solicitation of original work for inclusion, article review
- Robert Alexander Webinar Series (meets 6-8 times per year often on the 2nd Tuesday at 3:00 pm ET)
Responsibilities: programming and oversight for webinar series, including presenter outreach
- 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 (this committee is ideal for an individual who has used - or is actively using - a website hosted by NAEPC)

Committee placement subject to availability and leadership approval. Available committees, meeting dates, and times subject to change.

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS