



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 an article 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 & 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, regular contact with councils, promotion of benefits, programs & services for council consumption
Diversity, Equity & Inclusion (meets four to six times per year, schedule changes each year)
Responsibilities: encourage and support inclusion and collaboration within NAEPC's leadership, membership, and programming
Marketing (meets quarterly, dates vary)
Responsibilities: oversee activities to cultivate relationships with members and assist in meeting the association's growth and visibility goals
Publications (meets quarterly, dates vary)
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 quarterly, dates vary)
Responsibilities: development of affiliated local website solutions, www.naepc.org, 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