



Diversity, Equity & Inclusion Statement

It is the mission of the [National Association of Estate Planners & Councils](#) (NAEPC) to promote excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the Accredited Estate Planner® (AEP®) designation and Estate Planning Law Specialist (EPLS) certification.

NAEPC believes that everyone, no matter their situation or economic status, can benefit from the experience and advice of a competent and ethical estate planning professional.

NAEPC seeks to raise awareness and promote an environment that embraces diversity within our affiliated councils and their membership. In so doing, NAEPC strives to increase opportunities and access for the widest spectrum of people so that all professionally qualified individuals may join, collaborate, and thrive within an inclusive estate planning community.

The Diversity, Equity and Inclusion Task Force will continually review association operations for specific examples of implementation of the principles, values and targets set forth in this Statement. These findings will be reported to the Board of Directors and Membership.

This Diversity, Equity & Inclusion Statement, and any protocol adopted in furtherance of the Statement, may be amended by a simple majority of the Board of Directors of NAEPC.

Actionable Items Follow

Control Protocol:

- NAEPC appreciates a diversity of people, ideas, skills and life experiences including but not limited to; age, race, sex, religion, national or ethnic origin, gender, gender identity, physical ability, and sexual orientation.
- NAEPC embraces credentialed estate planning professionals from all business/compensation models, educational backgrounds, and geographic regions to meet the unique needs of the clients they serve.
- NAEPC values and respects the uniqueness of individuals and the varied perspectives and talents they provide.
- NAEPC believes that diversity of its affiliated councils and their membership is critical to its mission in serving a diverse public.

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG



NAEPC's core value of inclusion is purposefully reflected in our:

- **Leadership:** Through the selection process of Officers and Directors, the NAEPC Board of Directors will cultivate diversity of thought, experience, and identification among the Board that incorporates the varied backgrounds and ideas each individual brings for the overall good of the estate planning profession. The Board will encourage and support affiliated councils in promoting these same ideals at the local level, ultimately striving to create a slate of candidates at the national level that is reflective of our goals of diversity, equity, and inclusivity.
- **Education:** NAEPC and its affiliated local councils will invite and encourage speakers, authors and thought leaders from historically underrepresented populations to provide content at the national and local level on topics related to collaboration and the multi-disciplinary estate planning profession, as well as Diversity, Equity, and Inclusion. NAEPC will support its affiliated councils in their efforts to create a more diverse, equitable, and inclusive future for credentialed estate planning professionals through building a pipeline of qualified candidates via mentorship programs and other practices.
- **Inclusive Communication:** NAEPC will share resources related to diversity, equity, and inclusion with affiliated councils and spotlight activities of affiliated councils impacting diverse populations within their community.

03/19/2021

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG