

## ABOUT US

The National Association of Estate Planners & Councils (NAEPC) is an organization of professional estate planners and affiliated estate planning councils focused on establishing the highest professional and educational standards. NAEPC believes in the team approach to estate planning, involving cross-professional disciplines, to better serve the public's need.



## OUR MISSION

The National Association of Estate Planners & Councils (NAEPC) will 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.

## COLLABORATE · EDUCATE · CULTIVATE

## EDUCATION

The **Annual NAEPC Advanced Estate Planning Strategies Conference** features nationally-recognized presenters on advanced topics of interest to allied professionals and provides opportunities for attendees to build multi-disciplinary relationships while collaborating on cutting edge ideas and trends. The educational sessions are planned to be informative for every member of every estate planning council. [Learn More > www.naepc.org/conference](http://www.naepc.org/conference)

Robert G. Alexander

### Webinar Series

Yearly Subscription Available!



The **Robert G. Alexander Webinar Series** offers regularly-scheduled online programs that each provide one hour of Accredited Estate Planner® designation credit and subject matter in support of our core value, the multi-disciplinary approach to estate planning. Webinars can be watched live or at your leisure and can be purchased singly or

for the entire year. Visit our website for more information, including on-demand options and cost-saving series subscriptions. [Learn More > www.naepc.org/events/webinar](http://www.naepc.org/events/webinar)

Events hosted by other organizations and member benefit providers can be found at [www.naepc.org/membership/benefits](http://www.naepc.org/membership/benefits) by choosing "educational programming".

### Connect >

<https://www.linkedin.com/groups/874377>



**Newsletter >** Look for NAEPC News, the official council member newsletter from NAEPC, in your email inbox.

## DISCOUNT PROGRAMS FOR MEMBERS

Advance Choice / Docubank  
Ahrens Technologies, LLC & Legal Directives, LLC  
All Language Alliance, Inc.  
Arcadia Art Consultancy  
BAU Print and Mail Inc.  
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy, Ltd.  
Cloudia Assistant  
CollectorIQ  
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards  
*Estate Planning for the Sandwich Generation: How to Help Your Parents and...*  
Estate Planning Smarts / Brentmark Software  
EstatePlanningBinders.com  
Everplans  
Everything But The House  
Family Business Magazine  
Family Wealth Map  
FinancialAdvisors.com  
HeirSearch.com  
*Journal of Financial Service Professionals*  
Klark Proposal Software  
Lawgic, LLC  
Leading Response  
Legacy Talk  
Legal Binders Now (LBN)  
Life Document Organizer Kit / Smead Manufacturing Company  
LeadingResponse  
Lorman Education Services  
Merrill Anderson Company  
MileMark Media, LLC  
My Perfect Will  
My Personal DataSafe LLC  
NationalUnderwriter.com  
Rocket Matter, LLC  
Ruby  
The American College of Trust and Estate Counsel (ACTEC) Podcasts  
The Lasting Matters Organizer  
The Ultimate Estate Planner  
Tracers Information Specialists, Inc.  
*Trusts & Estates* magazine & WealthManagement.com  
Wolters Kluwer Tax & Accounting – CCH Publications  
Yourefolio.com  
Zola Creative Media & Legal Vault®

Access the entire list of member benefits at [www.naepc.org](http://www.naepc.org) or a council website hosted through NAEPC. Please visit often for updates!

## PUBLICATION



The *NAEPC Journal of Estate & Tax Planning* provides a best-in-class library of thought leadership relevant to the estate planning community. Visit for cutting-edge, multi-disciplinary information for all estate

planning professionals. Subscribe to receive direct notification of new issues. This benefit is particularly helpful for members who do not have access to their own library of relevant publications and now includes a “download all” feature for easy reading. [Learn More > www.naepcjournal.org](http://www.naepcjournal.org)

## DESIGNATION & CERTIFICATION PROGRAMS



The **Accredited Estate Planner® designation** is available to qualified professionals engaged in active practice for five years or more in the disciplines of accounting, insurance and financial planning, legal, philanthropy, and trust services who hold a gateway degree or designation of JD (active law license required), CPA, CLU®, CFP®, ChFC®, CPWA®, CFA, CAP®, CSPG, CTFA, MSFS, and MST and who meet stringent requirements with regard to education, experience, knowledge, professional reputation, and character and will commit to ongoing continuing education and recertification requirements. The only graduate-level designation in estate planning, AEP® designation helps clients and colleagues alike understand your belief in, and commitment to, the team concept.

[Learn More > www.NAEP.org/AEP](http://www.NAEP.org/AEP)

**Affiliated local estate planning councils have the privilege of utilizing the Council Nominated AEP® program. Information can be found at [www.naepc.org/affiliated-councils/council-nominated-aep-program](http://www.naepc.org/affiliated-councils/council-nominated-aep-program).**

The **Estate Planning Law Specialist certification** is available to attorneys who demonstrate a high level of professionalism and commitment to the concept of specialization through the Estate Law Specialist Board, Inc., an attorney-run subsidiary of the National Association of Estate Planners & Councils. [Learn More > www.naepc.org/designations/estate-law/introduction](http://www.naepc.org/designations/estate-law/introduction)



## BENEFITS FOR THE ESTATE PLANNING COUNCIL

[Learn More >](#) Contact us to request a 30-minute benefit review call.

- Council Nominated AEP® Program
- Leimberg Information Services (LISI) Subscription
- Programming Resources
- Sample Documents
- Website Solutions
- Leadership and Staff Executive/Administrator Development Sessions

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# BENEFITS BROCHURE 2021

