

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 appropriate 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 online programs on the 2nd Wednesday of each month at 3:00 pm ET. Each program provides 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 by choosing “educational programming”.

Connect >

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

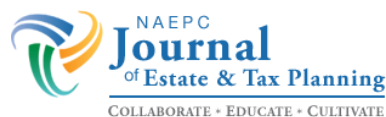


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Tracers Information Specialists, Inc.
Trusts & Estates magazine & WealthManagement.com
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Access the entire list of member benefits at www.naepc.org or a council website hosted through NAEPC. Please 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. [Learn More > www.naepcjournal.org](http://www.naepcjournal.org)

DESIGNATION & CERTIFICATION PROGRAMS



The **Accredited Estate Planner® designation** is available to 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.NAEPc.org/AEP](http://www.NAEPc.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.

The Estate Law Specialist Board, Inc., an attorney-run subsidiary of the National Association of Estate Planners & Councils, is the only ABA-accredited program for certification of an attorney as an **Estate Planning Law Specialist**. Attorneys who become board-certified under this program demonstrate a high level of professionalism and commitment to the concept of specialization.



[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

