

## ABOUT OUR ORGANIZATION



The National Association of Estate Planners & Councils (NAEPC) is a national 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.

## **THE ASSOCIATION OF CHOICE FOR ESTATE PLANNING PROFESSIONALS**

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### THE NAEPC 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.

## **EXCELLENCE IN ESTATE PLANNING**

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### THE ROBERT G. ALEXANDER WEBINAR SERIES



The Robert G. Alexander Webinar Series offers online programs on the 2<sup>nd</sup> Wednesday of each month at 3:00 pm ET. Each program provides one hour of Accredited Estate Planner® designation credit and offers 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 [www.naepc.org/events/webinar](http://www.naepc.org/events/webinar) for more information, including on-demand options and the series subscription.

### ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE & OTHER EDUCATIONAL PROGRAMMING

NAEPC offers a variety of educational opportunities through the Annual NAEPC Advanced Estate Planning Strategies Conference and various programs hosted by other professional associations. To learn more about the **Annual NAEPC Advanced Estate Planning Strategies Conference** held each November with the best multi-disciplinary continuing education content found within a very economical multi-day program, visit [www.naepc.org/conference](http://www.naepc.org/conference). Other events can be found at [www.naepc.org](http://www.naepc.org) in the member benefits section by choosing "educational programming".

## MEMBER DISCOUNT PROGRAMS

Advance Choice / Docubank  
AdvisorAdit LLC  
Ahrens Technologies, LLC & Legal Directives, LLC  
Bloomberg BNA  
Card Connect  
CCH  
Charitable Planning Desk Reference for Advisors / Strategic Philanthropy, Ltd.  
Cloudia Assistant  
CollectorIQ  
Discuss Directives, LLC - Heart2Heart Workbook & Deck of Cards  
Estate Planning Smarts / Pensworth  
EstatePlanningBinders.com  
Everplans  
Everything But The House  
Family Business Magazine  
Family Wealth Map  
*Florida Domicile Handbook / Disinherit the IRS*  
HeirSearch.com  
Klark Proposal Software  
Lawgic, LLC  
Legacy Talk  
Legal Binders Now (LBN)  
Life Document Organizer Kit by The Smead Manufacturing Company  
Merrill Anderson Company  
My Perfect Will  
My Personal DataSafe LLC  
NationalUnderwriter.com  
Ruby Receptionists  
Sterling Cut Glass  
The American College of Trust and Estate Counsel (ACTEC) Podcasts  
The LastingMatters Organizer  
The Ultimate Estate Planner  
*Trusts & Estates*  
WealthManagement.com  
Yourefolio.com  
Zola Creative Media & Legal Vault®

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Members of local councils can access the entire list of member benefits at <http://www.naepc.org/membership/benefits>. Those councils that have a website hosted through NAEPC show the entire list of partners on their website. Each location provides a description of each program or service. Benefits change often, visit website for details!



The *NAEPC Journal of Estate & Tax Planning* is published quarterly and contains cutting-edge technical information for practitioners. Visit [www.naepcjournal.org](http://www.naepcjournal.org) today and be sure

to join the mailing list to receive information about new issues as they are published. Visit [www.NAEPJournal.org](http://www.NAEPJournal.org) to read the most recent issue or subscribe!

#### BENEFITS AVAILABLE ONLY TO THE ESTATE PLANNING COUNCIL

- Council Nominated AEP® Program
- Leimberg Information Services (LISI) Subscription
- NAEPC Speaker Library Access
- Referral Lists and Documents
- Website Templates at Discounted Fees
- Yearly “No-Charge Speaker” Program
- Yearly Leadership Training at the Annual Conference and Regional Leadership Day Events (when offered)

#### NAEPC-ADMINISTERED PROFESSIONAL DESIGNATIONS

The **Accredited Estate Planner®** designation is available to professionals in the following disciplines - accounting; insurance and financial planning; legal; philanthropy; and trust services - who hold a gateway credential of CPA, CLU®, ChFC®, CFP®, CPWA®, CFA, MSFS, MST, JD, CAP®, CSPG, or CTFA - and meet stringent qualifications at the time of application and commit to ongoing continuing education and recertification requirements, the AEP® designation helps both clients and colleagues understand your belief in, and dedication to, the team concept of estate planning. To learn more, visit [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 about this program can be obtained by calling the national office.**

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. This program is currently the only program, other than certain state bar association programs which are only for residents of their particular states, accredited by the American Bar Association to Board-certify attorneys as Estate Planning Law Specialists.



Learn more about us at [www.NAEP.org](http://www.NAEP.org)  
& join our LinkedIn Group today!

# National Association of Estate Planners & Councils

## Programs & Services For Members of Estate Planning Councils

### *The Association of Choice for Estate Planning Professionals*

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