

# **National Association of Estate Planners & Councils**



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

# NAEPC WELCOMES

**your council,**  
a member of *the* national network  
of estate planning professionals!

# NAEPC MEMBERS

- 270 Affiliated Local Estate Planning Councils and their 30,000 Individual Members
- 2,000 Active Accredited Estate Planner<sup>®</sup> Designees (and growing!)

# MISSION

The National Association of Estate Planners & Councils 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® designation and Estate Planning Law Specialist certification.

# LEADERSHIP

- 21 Officers & Directors Representing 17 States and 24 Affiliated Local Estate Planning Councils
- A Wealth of Non-board Volunteers from Across the Country

# MEMBER BENEFITS

- 40+ Multi-Disciplinary Discount Programs Within Various Categories
- Regular Additions & Review
- Accessible at your council's website with your council user name & password (for sites hosted by NAEPC)

# MEMBER BENEFITS

Membership rate of \$60 for the  
**Robert G. Alexander Webinar Series**

Informative & educational webinars held  
monthly on the 2<sup>nd</sup> Wednesday  
3:00 – 4:00 pm ET

[www.naepc.org/events/webinar](http://www.naepc.org/events/webinar) or your  
council website (if hosted by NAEPC)

*Series Subscriptions Available*

# MEMBER BENEFITS, cont.

- Complimentary Resources
- Discipline-specific Information
- Educational Opportunities
- Marketing / Website Design Services
- Presentation Materials / Office Supplies
- Software
- Subscriptions & Publications
- Other Benefits, Programs & Services



# MEMBER BENEFITS, cont.

## Flagship Benefits

- Trusts & Estates, \$149 Subscription
- LINK: online collaboration-based education
- Many More!

# 55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

November 6 -9, 2018

Ft. Lauderdale, FL



Member Discount Available to  
Members of  
Affiliated Estate  
Planning Councils!

Early Bird Discount

Registration Opens April 2018

# **Annual Advanced Estate Planning Strategies Conference**

Experience Excellence in Estate Planning

- 2 ½ Days of Technical Education
- Earn Continuing Education Credit
- Participate in the Exchange of Ideas
- Network with Estate Planning Professionals From Around the Country

# **Accredited Estate Planner® Designation Program**

Awarded by NAEPC to recognized estate planning professionals who meet requirements of education, experience, knowledge, professional reputation, and character.

# Accredited Estate Planner® Designation Program, cont.

## Credentials Requirement:

Active license or certification as an

- Attorney;
- Accountant;
- Insurance & financial planner;
- Philanthropic advisor; or
- Trust officer –

To those holding one or more of the following credentials – JD, CPA, CLU®, CFP®, CFA, ChFC®, CPWA®, CAP®, CSPG, CTFA, MSFS, or MST.

# **Accredited Estate Planner® Designation Program, cont.**

## **Why Become an AEP®?**

- Recognition as a Professional Dedicated to the Team Concept of Estate Planning
- Demonstrate Special Knowledge and Abilities
- National Referral Program

# **Accredited Estate Planner® Designation Program, cont.**

## **Requirements for All Applicants**

- Gateway Degree or Designation
- Minimum 5 Years of Experience
- Presently & Significantly Engaged in Estate Planning
- Member in Good Standing of your EPC

# **Accredited Estate Planner® Designation Program, cont.**

## **Requirements for All Applicants, cont.**

- Professional References
- Ongoing Commitment to NAEPC Code of Ethics
- Yearly Continuing Education
- Annual Recertification & Dues
- Cooperation with Random Audit, if Selected



# **Accredited Estate Planner® Designation Program, cont.**

## **Paths to Secure Designation**

- **Education**

- Successful Completion of Graduate Coursework Through The American College or Accredited Business or Law School

- **15-Year Experience Exemption**

# Estate Planning Law Specialist Certification

- Offered Through the Estate Law Specialist Board, an ABA-Accredited Subsidiary of NAEPC
- Available to Attorneys with 5 Years or More of Experience Devoting 40% of practice to estate planning
- National Examination
- Yearly Renewal, 5-Year Recertification

# ONLINE RESOURCES

- *NAEPC Journal of Estate & Tax Planning ([www.NAEPCJournal.org](http://www.NAEPCJournal.org))*
- *Monthly Technical Newsletter Offered by Steve Leimberg*  
[www.naepc.org/events/newsletter](http://www.naepc.org/events/newsletter)

# **ASSOCIATION AWARDS & HONORS**

## **Hartman Axley Lifetime Service Award**

Awarded to those Highly Active in the  
Estate Planning Community and Crucial  
to the Development of NAEPC

# **ASSOCIATION AWARDS & HONORS**

## **Estate Planning Hall of Fame®**

Offered in Recognition of Distinguished  
Service to the Field of Estate Planning

# **INDUSTRY PARTICIPATION**

## **Founding Member of the Synergy Summit**

- Unified Think Tank and Voice of the Leadership of Eight Major Financial and Legal Services Organizations
- [www.SynergyPro.org](http://www.SynergyPro.org)

# CALL TO ACTION!

## Volunteers Needed!

- Accredited Estate Planner®  
Designation Committee (Active  
Designees Only, Please)
- Annual Conference Committee
- Council Relations Committee
- Website & Technology Committee

# NEED HELP?

NAEPC

1120 Chester Ave., Ste. 470

Cleveland, OH 44114

(866) 226-2224

[admin@naepc.org](mailto:admin@naepc.org)

[www.NAEPC.org](http://www.NAEPC.org)



*Welcome!*

We're glad to have you  
as a  
member council!