The Only Graduate Level,
Multi-disciplinary Credential
Emphasizing the Collaborative
Approach to Client Relationships

Why Earn the Accredited Estate Planner® Designation?

⇒ Set Yourself Apart from the Competition

⇒ Demonstrate Your Knowledge, Skill & Expertise

⇒ Identify Yourself as a Qualified Member of the Team

Apply for the Accredited Estate Planner® Designation Today!

QUALIFICATIONS

Core Value ·	Commitment to the team concept of estate planning
Credentials ·	Active license or certification as an attorney; accountant; insurance professional and financial planner; philanthropic advisor; or trust officer— holding one or more of the following credentials: JD, CPA, CLU®, CFP®, CFA, ChFC®, CAP®, CPWA®, CSPG, CTFA, MSFS, or MST
Reputation & Character ·	Three professional references of differing disciplines
Ethics ·	Declaration to abide by the NAEPC Code of Ethics
Education ·	Completion of two graduate courses from The American College or similar graduate courses through an accredited university, college, or school of law as part of a master's or doctoral degree program (fifteen+ years of experience in estate planning may exempt one from this requirement)
Experience ·	Minimum five years actively engaged in estate planning
Continuing Education ·	Minimum thirty hours of continuing education with fifteen in estate planning

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS
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