

WHY YOU NEED AN AEP®

An AEP® designee provides quality professional advice, and meets the highest standards of knowledge, skill, ethical conduct, and experience in estate planning.

An AEP® can:

1. Offer advice and prepare a personalized plan to help accumulate, preserve, and transfer your estate according to your objectives.
2. Explain all of the complex estate, tax, and personal planning issues regarding your individual, retirement, and business assets.
3. Provide personal, customized advice with respect to all of your estate and tax planning needs.
4. Encourage the team concept of estate planning and coordinate the services of all of your professional advisors (and refer additional professionals to round out your team) to provide a comprehensive estate plan suitable to your needs.

The AEP® designation is the only graduate level multi-disciplinary accreditation that focuses specifically on estate planning. It emphasizes multiple disciplines, including law, accounting, insurance, financial planning, and trust services. The Accredited Estate Planner® brings together these diverse areas of practice into one personalized plan to assure your family's financial well-being.

You should have the highest degree of confidence that an AEP® possesses expertise, experience, multi-disciplinary focus, and a strict code of ethics. These qualities will provide you the peace of mind that only comes through expert estate planning services.

For additional information on estate and financial planning topics, please visit
www.estateplanninganswers.org

For additional information regarding the ACCREDITED ESTATE PLANNER® (AEP®) credential or to locate an AEP® near you, contact the National Association of Estate Planners & Councils



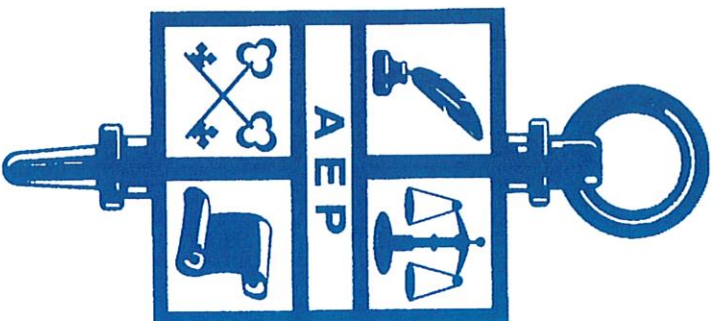
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*The Association of Choice
for Estate Planning Professionals*

**MAKE SURE YOUR
ESTATE PLANNING ADVISOR
HAS THE KNOWLEDGE, SKILL,
EXPERIENCE, AND HIGH ETHICAL
STANDARDS TO HELP YOU MAKE THE
RIGHT CHOICES**

**DEPEND ON THE COMPREHENSIVE
KNOWLEDGE AND EXPERIENCE OF AN**

**ACCREDITED ESTATE PLANNER®
(AEP®)**



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Estate Planners & Councils

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**PROFESSIONALS WHO HOLD THE
AEP® DESIGNATION AWARDED BY
THE NAEPC**

The National Association of Estate Planners & Councils (NAEPC) is a national non-profit organization of professional estate planners and affiliated local estate planning councils focused on establishing and monitoring the highest professional and educational standards in the estate planning profession.

With roots dating back to Boston in 1931, the NAEPC currently consists of approximately 230 local estate planning councils and their 27,000 members throughout the United States. Its mission is to promote excellence, professionalism, and the team concept of estate planning among credentialed professionals in the estate planning profession.

The NAEPC promotes the team concept of estate planning by invoking the skills of each of the professional disciplines it recognizes (accounting, insurance and financial planning, law, and trust services) in order to better serve the public's need for estate planning. A primary objective in meeting this need is fostering public awareness of the quality services provided by professionals who meet these standards.

In an effort to encourage the recognition and acceptance of estate planning as a specialty, the NAEPC established the AEP® designation that is available to credentialed individuals in each of the following disciplines:

- Accounting (CPA)
- Insurance & Financial Planning (CLU®/ChFC®/CFP®)
- Law (JD)
- Trust Services (CTFA)

The AEP® designation program is overseen by a committee consisting of members of the NAEPC board of directors, former board members, and other designees, all credentialed professionals from each of the four disciplines. They are responsible for determining eligibility requirements for the designation and insuring that designation holders continue to maintain the necessary knowledge, skill, experience, and ethical standards for their continued certification.

**REQUIREMENTS FOR THE
AEP® DESIGNATION**

The NAEPC has set high standards for eligibility with respect to education and comprehensive experience in estate planning. Accordingly, applicants and designees must meet and maintain all of the following:

* **Licensing.** An AEP® must be licensed to practice as an attorney, certified public accountant, chartered life underwriter, chartered financial consultant, certified financial planner, or certified trust and financial advisor.

* **Estate Planning Activities.** An AEP® must have acquired extensive knowledge as an estate planner and be significantly engaged in estate planning activities, including the accumulation, preservation, and transfer of assets through proper planning.

* **Experience.** An AEP® must either: (1) have a minimum of five years of professional experience as an estate planning practitioner and have successfully completed two graduate courses in estate planning from The American College or from another accredited graduate program as part of a master's or doctoral degree; or (2) have a minimum of fifteen years of professional experience as an estate planning practitioner

* **Affiliation.** An AEP® must continuously maintain membership in an affiliated estate planning council where one is available.

* **Professional Reputation.** An AEP® must remain in good standing within his or her respective professional organization(s) and license(s), and must be highly recommended by three unrelated, credentialed professionals practicing within the disciplines recognized by the NAEPC.

* **Commitment to Ethics.** An AEP® must sign a declaration agreeing to continuously abide by the NAEPC Code of Ethics.

* **Dedication to the Team Concept.** An AEP® must be committed to the team concept of estate planning.

* **Continuing Education.** An AEP® is required to complete at least 30 credits of continuing education (15 of which must be in estate planning), every two years and certify this to the NAEPC on an annual basis. This requirement insures that designation holders maintain a high level of expertise and remain current with the latest developments in estate planning.

* **Dedication to the Client.** An AEP® must remain dedicated and loyal to his or her clients.

* **Annual Audit.** Each year an audit of randomly-selected active designation holders is conducted to verify compliance with the requirements of continuing education, council affiliation, current licensing, and active practice.

*Clients Feel More Secure When Working
With an Advisor Who Holds
The AEP® Designation*