



## National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

### *Why Become an Accredited Estate Planner® (AEP®)?*

- Give the public a way to identify you as a qualified professional estate planner who is able to meet their estate planning and/or business succession needs
  - Demonstrate that you have special knowledge, skill, and expertise in the field of estate planning
    - Gain a competitive edge...success requires setting yourself apart from the competition
    - Acquire access to potential clients and to the resources of the National Association of Estate Planners & Councils through our Web site and annual conference
    - Expand your networking opportunities with other estate planning professionals from across the United States

### *Qualifications and Requirements*

- *Credential requirement* – active license or certification as an attorney (JD), accountant (CPA), insurance professional and financial planner (CLU®, CFP®, ChFC®), or trust officer (CTFA)
- *Experience requirement* – minimum of 5 years of experience in estate planning (15 years for council, board, and past president-nominated candidates)
- *Educational requirement* – applicants must successfully complete 2 graduate courses from The American College or similar graduate courses through an accredited university, college or school of law as part of a masters' or doctoral degree program (a minimum of 15 years of experience in estate planning exempts one from this requirement)
- *Membership requirement* – applicants must be a member of an affiliated local estate planning council where one is geographically available (50 miles or 60 minutes driving time)
- *Professional reputation and character requirement* – an applicant must provide 3 professional references; one of whom must share the same primary discipline and 2 others must be from 2 different disciplines
- *Continuing education requirement* – an applicant must have a minimum of 30 hours of continuing education, 15 of which must be in estate planning, every 24 months
- *NAEPC Code of Ethics* – applicants must sign a declaration statement to continuously abide by the NAEPC Code of Ethics
- *Team concept of estate planning* – applicants must acknowledge a commitment to the team concept of estate planning