



The Accredited Estate Planner[®] (AEP[®]) Designation from A – Z

Agenda

- NAEPC's Mission and Core Value
- Why Become an AEP[®] Designee?
- Who Qualifies to Become an AEP[®] Designee?
- How to Apply for the Designation
- Ongoing Requirements
- Council Nomination Program
- Benefits of Being an AEP[®] Designee
- Review Process
- Additional Resources

Our Mission

The National Association of Estate Planners & Councils (NAEPC) promotes excellence in estate planning by serving NAEPC members, delivering exceptional resources and unsurpassed education, and recognizing those members who hold the Estate Planning Law Specialist (EPLS) certification.

[EXCELLENCE IN ESTATE PLANNING]

Our National Network

A Snapshot of NAEPC by the Numbers



- 275 Affiliated Local Estate Planning Councils



- 30,000 Multi-Disciplinary Council Members
- 2,200 Accredited Estate Planner[®] Designees
- 88 Estate Planning Law Specialist Certificants*

**The EPLS Certification is offered by the Estate Law Specialist Board, Inc, a subsidiary of NAEPC. EPLS certificants are not recognized as an official member of NAEPC, but are eligible to take advantage of benefits, program and services.*

Accredited Estate Planner[®] (AEP[®]) Designation Core Value

Awarded by NAEPC to estate planning professionals who meet requirements of education, experience, knowledge, professional reputation, and character. All applicants must agree to continuously abide by the NAEPC Code of Ethics, must acknowledge the highly complex, multi-disciplinary nature of estate planning, and must commit to the core value of collaboration and the team concept in their approach to client relationships by signing the Applicant Declarations document as part of the application process.

Accredited Estate Planner® (AEP®) Designation

Why Become an AEP® Designee?

- Recognition as a professional dedicated to the team concept of estate planning
- Complimentary AEP® Networking and Forum events
- National Referral Network
- Exclusive LinkedIn Group for Designees Only
- Discounts on NAEPC Webinars & Annual Conference
- Use of Electronic AEP® Badge for social media
- Bi-Monthly ***AEP® Alert***

Accredited Estate Planner[®] Designation Qualifications & Requirements for All Applicants

- Active practice for a minimum of 5 years within the following disciplines: accounting; insurance/financial planning; law; philanthropy; or trust services
- Devoting at least 1/3 of one's time to estate planning
- Holding one or more of the following credentials in active status and good standing: CPA, CLU[®], CFP[®], CFA, ChFC[®], CPWA[®], CAP^{®*}, CSPG, CTFA, JD, MSFS, and MST**
- Three professional references (unless council nominee)
- Current membership in an affiliated council

* Applicants applying with CAP[®] only must take MSFP615 through The American College regardless of the years of experience

** Applicants with MST as the qualifying credential must secure pre-approval from the national office before applying

Accredited Estate Planner[®] Designation Ongoing Requirements

Participation in annual recertification process to certify:

- Continuing engagement in estate planning activities
- Continuing commitment to NAEPC Code of Ethics and team concept of estate planning
- Continuing education requirement of 30 hours earned every 2 years with 15 hours in estate planning topics
- Maintaining all other professional designations in active status and good standing
- Continuing membership in an affiliated estate planning council
- Cooperation with random audit if selected
- Payment of annual dues to maintain designation

Accredited Estate Planner[®] (AEP[®]) Designation – Self-Nomination Program

- Two Pathways to Attainment through the
Self-Nomination Program
- Education
 - Successful completion of 2 graduate courses through The American College of Financial Services or another accredited educational institution, business school, or school of law
- Experience*
 - With 15 years or more of experience in estate planning may opt out of the educational requirement

*(*Reduced to 10 years if nominated by the council)*

Accredited Estate Planner® Designation Council Nomination Program History

- In 2004, the NAEPC board created the council nomination program in recognition of the fact that as council leaders you are in a unique position to know who in your council may be interested in the designation and qualified for a council nomination
- Accomplished by a Council Nomination Resolution signed by the current council president and one additional council officer, the council nomination process offers the candidate a more streamlined application process with a reduced application fee
- At the same time, the council benefits from the fact that membership in the council is required in order to maintain the designation in active status and good standing
- Your council's participation affirms the core value that brings all members of the NAEPC together – excellence in estate planning!

Accredited Estate Planner[®] Council Nomination Program – How it differs from self-nomination

- Streamlined application process
- Council Nomination Resolution stands in for otherwise required 3 professional references
- Application fee is reduced by 50%
- Minimum experience requirement is 10 years actively engaged in estate planning
- Graduate coursework is not required for council nominees

<http://www.naepc.org/affiliated-councils/council-nominated-aep-program>

Accredited Estate Planner[®] Council Nomination Program – Guidelines for Use

- Affiliated councils with less than 100 members may nominate 1 qualified candidate in each of the 5 disciplines plus 1 additional for a total of 6 nominees each calendar year; councils with more than 100 members may double the total number of nominations
- Begin this process by reviewing list of current members to see who already holds the designation
- Form a committee dedicated to sharing information about the designation program with interested council members
- Nominations are usually discussed during a board meeting where potential nominees have been identified
- Execute a council nomination resolution signed by current council president and 1 additional council officer on behalf of nominees
- Nominees complete the Council-Nominated Application provided by national

Accredited Estate Planner[®] Council Nomination Program – Stipend Program

- To encourage participation, national offers an incentive to hold an AEP[®] informational event in a format that fits your schedule and vision where information about the designation program will be shared with your members while communicating your willingness to nominate members
- National will reimburse your council for event expenses – virtual or in person – up to \$500 to co-host this event
- Administrative staff at national is available to share how other councils have chosen to host successful events and to share creative ideas for hosting a virtual or in-person event
- AEP[®] trifold brochures and other information about member benefits can be provided to you at no cost to share with your members
- National Board and AEP[®] Committee Members may be available to participate in the event upon request

Accredited Estate Planner[®] (AEP[®]) Special Circumstances and Review Process

- For applicants applying with the Chartered Advisor in Philanthropy[®] **only**, must take MSFP 615 Advanced Estate Management and Planned Giving (formerly GS 815 Advanced Estate Planning) through The American College of Financial Services regardless of years of experience; those with less than 15 years must take one of the elective courses as well
- For applicants applying with MST degree as the qualifying credential, must secure pre-approval from national before submitting application
- All applications regardless of pathway, are subject to a 2-part review process, the first of which is administrative where all documentation submitted with the application is reviewed and verified, followed by a comprehensive review by a national committee composed of members of the AEP[®] Designation Committee who also currently serve as national board members or past presidents of NAEPC

Accredited Estate Planner[®] (AEP[®]) Designation NAEPC Website Links & Other Resources

- <https://www.naepc.org/designations/estate-planners> - Introduction
- <https://www.naepc.org/designations/estate-planners/search#spec/All> - Search for an AEP[®]
- <https://www.naepc.org/designations/estate-planners/aep-designation> - FAQs
- <https://www.naepc.org/affiliated-councils/council-nominated-aep-program> - Council Nomination Program

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