



The AEP® Designation Council Nomination Program Explained

Estate planning councils affiliated with the National Association of Estate Planners & Councils have the privilege of nominating qualified individuals to apply for the Accredited Estate Planner® (AEP®) designation through the “AEP® Council Nomination Program.” Your council’s participation affirms the core value that brings all members of NAEPC together – excellence in estate planning. Please consider this letter your council’s invitation to participate.

We are pleased to offer an incentive to hold an AEP® informational event in a format that fits your schedule and vision (even for virtual events!) so that the AEP® designation can be reviewed in depth with those who have an interest, or those whom your council may like to nominate. NAEPC will reimburse your council for expenses of up to \$500 to co-host this event. Our administrative staff is always 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!

The only graduate level, multi-disciplinary credential in estate planning, the AEP® designation is awarded to professionals who meet requirements of education, experience, knowledge, and professional reputation and holding the AEP® designation helps clients and colleagues understand the designee’s commitment to the collaborative approach to estate planning. Individuals must meet strict requirements to be considered for a council nomination and applicants must meet stringent qualifications and commit to ongoing recertification requirements. A partial review of the qualifications follows:

AEP® Designation Explained

- **Credential** · active license or certification in the disciplines of accounting; insurance/financial planning; legal; philanthropic; or trust services – holding one or more of the following credentials: CAP®*, CFA, CFP®, ChFC®, CLU®, CPA, CPWA®, CSPG, CTFA, JD (active law license required if this is the only credential with which one is applying), MSFS, and MST**
- **Experience** · the minimum experience requirement for council-nominated candidates is now ten years! One must still devote at least 1/3 of one’s professional time to estate planning
- **Commitment to Education** · maintain a minimum of 30 hours of continuing education, 15 of which must be in estate planning, during the 24 months prior to applying and every two years thereafter

It’s important to note that the AEP® Council Nomination Program is not your members’ only pathway to obtain the AEP® designation. Members, including those who do not yet have the minimum 10 years required for a council nomination but do have at least 5 years of experience and are willing to meet additional requirements***, are always welcome to self-nominate. Your council’s nomination, however, streamlines the application process, reduces the application fee by 50%, and acknowledges those within your membership who are also recognized within your community as exemplary estate planners. Councils that participate help their members distinguish themselves among peers, clients, and within the council membership itself. Active designees are required to maintain a membership in an affiliated local council and most often when having received a council nomination, this council will be yours so there may be an additional benefit of member retention.



Please complete and return the commitment form found on the reverse of this page. We’ll be in touch soon after to review the program requirements, answer any questions your leadership may have, and make sure you have a supply of all of the necessary materials.

*Applicants applying with CAP® designation only, must have successfully completed GS 815 – Advanced Estate Planning through The American College

**Special requirements must be met and approved by the national office before applying

***Self-nominating candidates with 5 – 15 years of experience must successfully complete two graduate courses provided through The American College

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114
(866) 226-2224 · NAEPC.ORG



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Commitment Form

Name of Council Leader/Contact: _____

Name of Council: _____

Email Address: _____

Phone Number: _____

_____ Yes, we will participate in the AEP® Council Nomination Program and will host an informational event where information about the AEP® Designation Program will be shared with invited council members; we agree to share information about the this program with NAEPC administrative staff.

_____ We would like to have a member of the AEP® Designation Committee, NAEPC board member, and/or national administrative staff attend our council event or participate virtually.

_____ We would like NAEPC administrative staff to contact us concerning successful events held by other affiliated councils.

Our council understands that by signing this form, we are agreeing to hold a special event for potential council nominees for the AEP® designation and that we will submit receipts to NAEPC within 30 days of the event in order to be reimbursed up to \$500 for our event expenses. Furthermore, we will also submit a list of event attendees with email addresses to national to facilitate follow up concerning the designation program.

Signature of Council Leader/Contact: _____

Date: _____

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