

# Why You Need An AEP® Designee



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

An AEP® is prepared to:

- Offer advice and create a personalized plan to help accumulate, preserve, and distribute your estate according to your values and objectives.
- Explain all of the complex estate, tax, and personal planning issues regarding your individual, retirement, and business assets.
- 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 suited to your needs.

The only graduate level, multi-disciplinary credential that focuses specifically on estate planning, the AEP® designation acknowledges multiple disciplines, including law, accounting, insurance and financial planning, philanthropy, and trust services. Designees cultivate these areas of practice into one personalized plan to assure your family's financial well-being.

AEP® designees provide the peace of mind that comes from working in partnership with a dedicated and experienced professional.



**NAEPC**  
**NATIONAL ASSOCIATION OF  
ESTATE PLANNERS & COUNCILS**  
COLLABORATE · EDUCATE · CULTIVATE

This brochure is provided to you by:

Accredited  
Estate  
Planner®  
(AEP®)  
Designation

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Estate Planners & Councils

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The National Association of Estate Planners & Councils cultivates the skills of each of its recognized disciplines in order to better serve the public's need for estate planning.

The AEP® designation is available to credentialed professionals within each of the following disciplines:

- Accounting (CPA)
- Insurance & Financial Planning (CLU®/ChFC®/CFP®/CFA/CPWA® /MSFS/MST)
- Law (JD)
- Philanthropy (CAP®/ CSPG)
- Trust Services (CTFA)

The program is overseen by a committee of active designees who reflect the focus and expertise of each of the five disciplines. This body is responsible for determining eligibility requirements and ensuring that designation holders continue to maintain the necessary knowledge, skill, experience, and ethical standards.



Learn more about the Accredited Estate Planner® designation

[www.NAEP.org/AEP](http://www.NAEP.org/AEP)

## Requirements

The NAEPC requires the highest standards for eligibility. All applicants and designees must meet and maintain all of the following components:

### Credential •

An AEP® must be actively licensed or certified as an attorney; accountant; insurance and financial planner; philanthropic advisor; or trust officer.

### Concentration •

An AEP® must have extensive knowledge as an estate planner devoting at least a third of one's professional time to estate planning activities, including the accumulation, preservation, and distribution of assets through proper planning.

### Experience •

An AEP® must either: (1) have a minimum of five years of professional experience as an estate planner and have successfully completed two graduate courses in estate planning from The American College of Financial Services or 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.

### Ethical Commitment •

An AEP® must sign a declaration agreeing to continuously abide by the NAEPC Code of Ethics and the Professional Responsibilities, both of which embody the expected professional behavior of all designees.

### Professional Reputation •

An AEP® must certify that all designations and licenses are in good standing and must be recommended by three unrelated, credentialed professionals practicing within the disciplines recognized by the NAEPC.

### Recognition of the Team Concept •

An AEP® must acknowledge the highly complex nature of estate planning and seek to understand the interdependencies among the professionals on the team.

### Affiliation •

An AEP® must maintain membership in an estate planning council that is affiliated with NAEPC to develop relationships with multi-disciplinary professionals in their community. These relationships, in addition to the education obtained through the local council, enhance both the profession and client service.

### Continuing Education •

An AEP® must complete at least 30 hours of continuing education every two years and certify this to the NAEPC on an annual basis. This requirement ensures that designation holders maintain a high level of expertise and remain current with the latest developments in estate planning.

### Annual Audit •

An AEP® must participate in the annual audit if selected to verify compliance with the core program requirements.