



Affiliated Council AEP® Nomination Resolution
*RESOLUTION OF THE BOARD OF DIRECTORS OF AN AFFILIATED
 ESTATE PLANNING COUNCIL*

to the NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

NOMINATING A CANDIDATE FOR THE ACCREDITED ESTATE PLANNER® DESIGNATION

At a regularly scheduled meeting of the Board of Directors of the _____ Estate Planning Council held on the ____ day of _____, 2024, the following resolution was adopted:

WHEREAS the above-named Estate Planning Council is a local or regional Estate Planning Council in good standing with the National Association of Estate Planners & Councils (NAEPC); and

WHEREAS the Board of Directors of said Council would like to nominate one of its members to be an Accredited Estate Planner® (AEP®) candidate pursuant to the NAEPC Accredited Estate Planner® Designation Handbook; and

WHEREAS said candidate nominee holds one or more of the following in active status [JD, CPA, CLU®, ChFC®, CFP®, CFA, CPWA®, CAP®, CSPG, CTFA, MSFS, MST (*please circle applicable designations*)], and, to the best of our information and belief, is presently and significantly engaged in estate planning activities as a(n) [attorney; accountant; insurance/financial planning professional; philanthropic professional; or trust professional (*please circle only one primary discipline*)]; and

WHEREAS said candidate is a member in good standing of our Estate Planning Council, has ten (10) or more years of experience in estate planning and estate planning activities, is recognized in our community as an exemplary estate planner, embraces the team concept of estate planning, and adheres to the NAEPC Code of Ethics,

NOW THEREFORE, upon motion made, duly seconded, and adopted by the Board of Directors, it is:
 RESOLVED, that the Board of Directors of the above-named Estate Planning Council hereby nominates _____ to the National Association of Estate Planners & Councils as an Accredited Estate Planner® candidate.

 Name of Nominating Estate Planning Council and Location (City and State)

 Signature of Council President

 Signature of Second Council Officer

 Printed Name of Council President

 Printed Name of Second Council Officer & Office Held

Please note: If the nominee is the current council president, please have the vice president or another council officer sign this form in lieu of the president.

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS