

## NAEPC History, Mission & Vision

Formed in 1962, the National Association of Estate Planners & Councils (NAEPC) is a national organization of affiliated estate planning councils and professional estate planners focused on



### EXCELLENCE IN ESTATE PLANNING

by serving estate planning councils and their credentialed members and delivering exceptional resources and unsurpassed education to councils and professionals alike.

**NAEPC was created, and exists today, with the core belief that a client's estate planning needs are best served by a team of qualified professional advisors.**

It is our belief that the primary and most effective means for networking among the various disciplines is at the local council level.

We also believe that the educational opportunity found within the over 275 estate planning councils affiliated with NAEPC provides their estimated 30,000 individual members with exceptionally high-quality education that has contributed not only to the profession as a whole, but also to the overall strength and viability of NAEPC and estate planning councils across the country.

## Getting Started

Joining NAEPC is fast, easy, and inexpensive!

Councils with < 40 members, \$115/year  
Councils with 41 - 100 members, \$175/year  
Councils with 101 - 250 members, \$375/year  
Councils with 251- 400 members, \$525/year  
Councils with 401+ members, \$575/year

*\*No per-member fee, dues are invoiced each calendar year.*

New councils are required to submit a brief application (found at [www.NAEPC.org](http://www.NAEPC.org) or obtained at [councilservices@naepc.org](mailto:councilservices@naepc.org)). NAEPCs primary requirement is that the council admit the fundamental disciplines to membership. In addition, councils are asked to supply a copy of the current bylaws, list of officers, and an Excel membership listing\* at the time of application.

### National Association of Estate Planners & Councils

2001 Crocker Rd., Ste 510  
Westlake, OH 44145

866-226-2224  
[councilservices@naepc.org](mailto:councilservices@naepc.org)  
[www.NAEPC.org](http://www.NAEPC.org)



\*NAEPC is committed to protecting the privacy of your member data and will only use the information to send six email newsletters and one hard-copy Advanced Estate Planning Strategies Conference brochure per year. For more information on our commitment, visit the "Every Council Campaign" page of [www.NAEPC.org](http://www.NAEPC.org).

# Estate Planning Council Benefits of Affiliation

Become a part of the **National Association of Estate Planners & Councils**, the association of choice for estate planning professionals!


275 Estate Planning Councils, their 30,000 credentialed members,

**ONE NATIONAL NETWORK**

## Advantages of Affiliation

### Lending a Hand To Your Board of Directors

We know your board of directors works hard, and that your professional administrator does too! NAEPC provides all affiliated councils with helpful resources to make those jobs easier, like:

- The **NAEPC Minute**, a helpful publication for council leaders, delivered directly to your officers via email, that contains administrative updates and best practices
- An opportunity to attend **Council Leadership Conference** held each year at the Advanced Estate Planning Strategies Conference, or  other leadership events held either in person or virtually - events that provide leadership development and an opportunity to learn from other councils
- Access to **referral lists** that address commonly-noted challenges and sample documents
- **Speaker Access** - NAEPC provides several options to help you fill your annual programming calendar
- **Webinars** suitable for use as council meetings

### Serving Your Members

NAEPC believes that your members are your own! By the virtue of your council's affiliation, your members can take advantage of a variety of opportunities, including:

#### Education

Whether your members choose to attend the **Advanced Estate Planning Strategies Conference** or a webinar hosted as a part of the **Robert G. Alexander Series**, they are guaranteed the lowest possible registration fee and will enjoy the benefit of dynamic, high-caliber, multi-disciplinary presentations.

#### Value Partners

Companies that have agreed to provide NAEPC members with a discount on their specific program, service, educational opportunity, etc.

#### Publication



The **NAEPC Journal of Estate & Tax Planning** is available online without password restriction and contains a wealth of cutting-edge information provided by thought leaders in the estate planning community.

[www.NAEPJournal.org](http://www.NAEPJournal.org)

Publication date 04/2024

### Supplemental Services & Council Recognition

#### Supplemental Services

**Looking for a website? We have the solution!**

Built by and for estate planning councils, fees range from \$800 - \$1600/year with a 50% discount on year one service for new users.

**LISI**  
LEIMBERG INFORMATION SERVICES INC.

Through a very special arrangement, estate planning councils affiliated with NAEPC have an opportunity to provide their members with the **Leimberg LISI Service** at a greatly reduced fee of \$24/member/year. Visit [www.NAEP.org](http://www.NAEP.org) for more information.

Participate in the **Council Nominated Accredited Estate Planner®**

**Designation Program** and honor your most respected members with the only graduate-level specialization designation in estate planning.



#### Council Recognition

- Direct link on [www.NAEP.org](http://www.NAEP.org) to your estate planning council website and members included within
- Invitation to participate in **Walter Lee Davis, Jr. & Leonard H. Neiman Council of Excellence Award** application process yearly