

Dear Council Member,

The AEP® designation recognizes professionals in the areas of estate planning who meet the strictest requirements of knowledge, experience, character and reputation. As an affiliated member of the National Association of Estate Planners and Councils (NAEPC), we are able to nominate candidates from our membership for the AEP® designation.

We are now accepting applications from members who are interested in the designation. Applicants will be selected by board resolution, subject to the following requirements:

- Applicants must be presently and significantly engaged in “estate planning activities” as an attorney, accountant, insurance professional and financial planner, or a trust officer. No more than two candidates from each discipline will be selected.
- Candidates must have a minimum of 15 years experience in estate planning.
- Candidates must provide documentation of licensing to practice as an attorney (JD) or certified public accountant (CPA), or hold one of the following designations: Chartered Life Underwriter® (CLU®), Chartered Financial Consultant® (ChFC®), Certified Financial Planner (CFP®), or Certified Trust & Financial Advisor (CTFA).
- Candidates must be PBCEPC members in good standing, and have been members for a minimum of 3 years.

Please complete the attached, initial application for board consideration and return it to us by November 30, 2012. The Board of Directors will review the applications and nominate candidates in January 2013.

Individuals who are selected by the board will be sent a copy of the Affiliated Council AEP Nomination Resolution and a full application. Candidates will need to submit to the NAEPC a completed application and \$250.00 (the application fee of \$125.00, which includes the Council’s 50% discount, and first year annual dues of \$125.00).

Maintaining the designation requires annual dues and 30 hours of continuing education every 24 months, of which at least 15 hours must be in estate planning. For more information about the designation, please visit: www.naepc.org/AEP_qualifications2.pdf.

Please contact Wanda Doumar if you have any questions. We wish all candidates the best of luck.

Sincerely,

Robert Burns, President

Ellen H. Gallagher, Past President



Palm Beach County Estate Planning Council

APPLICATION

FOR CONSIDERATION AS A COUNCIL NOMINATED AEP® CANDIDATE

Please complete this initial application for board consideration and submit to us by November 30, 2012.
The Board of Directors will review applications and select candidates in January 2013.

You may email your completed application to admin@pbcepc.org or fax to (561) 691-0470.

PERSONAL INFORMATION

(Please print or type)

Name _____

Date of Birth _____

Name of Firm or Organization _____

Title _____

Business Address _____

City _____ State _____ Zip _____

Telephone Number _____ Fax Number _____

E-Mail Address _____

PROFESSIONAL DISCIPLINE

I am presently engaged in "estate planning activities" *primarily* (check only one primary discipline) as:

- Attorney Accountant Insurance Professional and Financial Planner Trust Officer

Total years of Experience in Estate Planning (*15+ years required for council nominated candidates*): _____

PROFESSIONAL LICENSE(S) / DESIGNATION(S) / DEGREE(S)

My Professional license(s)/designation(s) are currently in effect:

- CPA Certificate Number _____ by State of _____ Year Issued _____
- State Bar License Number _____ by State of _____ Year Issued _____
- CLU® (Student Identification Number, if available) _____ Year Attained _____
- ChFC®(Student Identification Number, if available) _____ Year Attained _____
- CFP® Identification Number _____ Year Attained _____
- CTFA Identification Number _____ Year Attained _____
- I am subject to FINRA regulation and hold the following License(s) _____

Please supply a copy of licenses and/or certificates for each license, degree and/or designation.
For degrees earned, please provide the name of the degree, educational institution and year awarded:

REFERENCES

Please list the name, company and address of three professionals in the estate planning area with whom you have worked:

- 1. _____
- 2. _____
- 3. _____

I hereby certify that the information in this application is true and correct to the best of my knowledge and belief.

NAME (Please print or type) _____

Signature _____ Date _____