

AEP®

THE ACCREDITED ESTATE PLANNER® DESIGNATION



Earn the Accredited Estate Planner® Designation Today

Qualifications

Core Value – Commitment to the team concept of estate planning

Credential(s) – Active license or certification as an attorney, accountant, insurance professional, financial planner, philanthropic advisor, or trust officer – holding one or more of the following credentials: JD, CPA, CLU®, CFP®, CFA, ChFC®, CPWA®, CAP®, CSPG, CTFA, MSFS or MST

Reputation & Character – Three professional references of differing disciplines

Ethics – Declaration to continuously abide by NAEPC Code of Ethics

Education – Completion of two graduate courses from The American College or similar graduate courses through an accredited university, college, or school of law as part of a masters' or doctoral degree program (fifteen+ years of experience in estate planning may exempt one from this requirement)

Experience – Minimum five years actively engaged in estate planning

Continuing Education – Minimum thirty hours of continuing education with fifteen in estate planning every two years

The Accredited Estate Planner® designation is administered by the National Association of Estate Planners & Councils, of which the Estate Planning Council of St. Louis is a member council.

The ONLY graduate level, multi-disciplinary designation in estate planning

- Gain a Competitive Advantage
- Set Yourself Apart from Your Competition
- Demonstrate Your Knowledge, Skill and Expertise
- Identify Yourself as a Qualified Member of the Estate Planning Team

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