



IN A FEW SENTENCES, PLEASE SHARE WHY YOU ARE APPLYING FOR THE AEP® DESIGNATION
AND WHAT IT MEANS TO YOU
PROFESSIONAL CREDENTIALS

My professional license(s) / designation(s) (listed below) are currently in effect and in good standing:

- ☐ 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 _____
- ☐ CFA (Charter Number, if available) _____ Year Attained _____
- ☐ CTFA Identification Number _____ Year Attained _____
- ☐ CPWA® Identification Number _____ Year Attained _____
- ☐ CAP® (Student Identification Number, if available) _____ Year Attained _____
(Applying with CAP® ONLY requires completion of MSFP 615 Advanced Estate Management and Planned Giving regardless of the years of experience. Applicants with less than 15 years of experience must also take one of the following electives – MSFP 543 Business Succession Strategies, MSFP 584 Executive Compensation, or MSFP 589 Financial Statements and Business Valuation Analysis as courses earned toward securing the underlying “gateway” designation or degree do not qualify for the AEP® graduate coursework requirement.
- ☐ CSPG Identification Number _____ Year Attained _____
- ☐ MSFS (Student Identification Number, if available) _____ Year Attained _____
- ☐ MST (Student Identification Number, if available) _____ Year Attained _____
(Specific criteria required; must be pre-approved before applying)
- ☐ I am subject to FINRA regulation* and hold the following License(s) _____
(*Please note that any disclosure event included in the FINRA report will be reviewed and may require explanation or clarification by the applicant)

~~For degrees earned, please provide the name of degree, educational institution, and year awarded here.~~

Version prior to 2011 that refers to list of credentials above: Please supply a copy of licenses and/or certificates for each license, degree or designation.

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

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