



## **AEP® Council Nomination Program** ***For the Lake County Estate Planning Council***

Professional estate planners can achieve an accreditation that acknowledges their experience and specialization in estate planning. **Simply put, the Accredited Estate Planner® designation means “I believe in the team concept of estate planning.”**

The designation is awarded by the NAEPC, of which the **Lake County Estate Planning Council** is a member chapter, to recognize estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character. The AEP® designation helps both clients and colleagues understand your belief in, and dedication to, the core mission of the collaborative approach to client relationships.

In 2004, the NAEPC board created the council nomination program in recognition of the fact that as council leaders you are in a unique position to know who in your council deserves the honor of being nominated for the AEP® designation. We, therefore, encourage your council to participate in this special program which not only benefits the nominated candidates but the councils as well. The council nomination process offers the candidate a more streamlined application process with a reduced application fee. At the same time, the council benefits from the fact that membership in the council is required to maintain the designation in active status and good standing which is verified as part of the annual recertification and dues renewal process.

As an affiliated council with more than 100 members, your council is entitled to nominate 2 qualified candidates in each of the 5 disciplines that we recognize – accounting, insurance/financial planning, legal, philanthropic, and trust – plus 2 additional in any of the 5, for a total of 12 on an annual, calendar year basis.

Currently, of your 121 members, 9 are active designees who are as follows:

- James Farmer – 2024
- Oleg N. Feldman – 2025 (council nomination)
- Jeff Fosselman – 2025
- Bill Kavanaugh – 2003
- Dennis Kratochwil – 2008 (council nomination)
- Eric O'Brien – 2024 (council nomination)
- Nimisha Patel – 2024 (national board nomination)
- Lauren Rosberg – 2023 (national board nomination)
- Brendan Van Egeren – 2025 (council nomination)

### **Why should you be interested in earning the AEP® designation?**

- Gain a competitive edge and set yourself apart from the competition
- Demonstrate your knowledge, skill, and expertise

### **NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS**

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2001 CROCKER ROAD, SUITE 510 WESTLAKE, OH 44145  
(866) 226-2224 · NAEPC.ORG · ADMIN@NAEPC.ORG



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- Identify yourself as a qualified member of the estate planning team
- Listing on [national searchable database](#) including discipline and contact information where one can search by state or zip code – check out our new electronic badge while there!
- Invitation to contribute to the exclusive [AEP® group on LinkedIn](#)
- Direct delivery of the [NAEPC Journal of Estate & Tax Planning](#)
- New and improved designee registration discount of \$175 for the [62<sup>nd</sup> Annual NAEPC Advanced Estate Planning Strategies Conference](#) being held on October 19 – 23, 2025 in Washington, DC where two designee-only events will be held. **New designees** now have an opportunity to attend one conference within the first two years of membership with a 50% discount on the registration fee!
- Designee-only events as part of the Forum Series offered on a complimentary basis throughout the year where you can meet and network with fellow designees and share your ideas about member benefits with the national leadership

#### **Eligibility Requirements for a Council Nomination**

- **Credentials** – 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® (those applying with CAP® only, must take MSFP615 – Advanced Estate Management and Planned Giving through The American College), CSPG, CTFA, MSFS, or MST
- **Experience** – Minimum of 10 years of experience significantly engaged in estate planning devoting at least 1/3 of your professional time to estate planning (If interested members do not have 10 years but have at least 5 years of experience, one can still obtain the designation by meeting additional education requirements, among others, under the self-nomination program described below)
- **Continuing Education** – Earn and maintain a minimum of 30 hours of continuing education, 15 of which must be in estate planning, during the 24 months prior to applying for the designation; every 2 years once awarded the designation
- **Code of Ethics** – sign a declaration statement to continuously abide by the NAEPC Code of Ethics
- **Core Mission** – acknowledge a commitment to the team concept of estate planning

#### **Eligibility Requirements for Self-Nomination**

- **Credentials** – please see above
- **Experience** – Minimum of 5 years actively engaged in estate planning ; those applicants with less than 15 years or more of experience must take two additional graduate level courses through [The American College of Financial Services](#) or another accredited educational institution
- **Continuing Education** – please see above
- **Professional Reference Requirement** – Three professional references from individuals, each in a unique discipline, and with whom the applicant has worked as part of an estate planning team
- **Code of Ethics** – please see above
- **Core Mission** – please see above

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