



National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

	2009 Amelia Island FL	2008 Scottsdale AZ	2007 New Orleans LA	2006 Amelia Island FL	2005 Grapevine TX
Attendee Discipline					
CLU/Life Insurance Professional*	34%	12%	11%	9%	10%
ChFC/CFP®*	see below	15%	16%	13%	13%
CPA	9%	20%	19%	20%	16.5%
CTFA/Trust Officer	14%	22%	18%	22%	24%
Attorney	24%	16%	22%	23%	19%
Other/Unidentified	18%	15%	14%	13%	17.5%
Repeat Attendance Statistics					
First Time	60%	69%	55%	60%	61%
2-4 times	30%	23%	36%	26%	29%
5-7 times	3%	3%	4%	13%	3%
8+ times	7%	5%	5%	1%	7%
Geographic Data					
Percentage of total attendees from home state of conference	23%	31%	26%	35%	40%

**Categories combined in 2009 to “insurance and financial planning”.*

*Statistics are based on survey results from each event
and are estimated based on the percentage of respondents.*

The Association of Choice for Estate Planning Professionals