



National Association of Estate Planners & Councils
1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

NAEPC Member Value Partner
Product Review Application

Date: _____

Product Name or Organization Name:

Contact Person: _____

Address: _____

City, State & Zip: _____

Phone: _____ Fax: _____

Organization Website: _____

Email: _____

Please complete the following...

Our product or service best fits the following category(ies):

- software related to estate planning
- conferences, seminars, webinars and other educational opportunities (must supply complete registration brochure/program information and complimentary admission in order for committee to review)
- books, magazines and other publications related to estate planning
- industry-specific information related to estate planning (example: software specific to attorneys)
- programs and services appropriate for council development (example: Konica / Minolta)
- marketing and website design services
- other – please explain _____

Please explain the discount being offered to NAEPC members with a notation of how the discount compares to relationships with other professional organizations (if applicable) _____

Please explain how the ordering process will be handled, include information about whether an online ordering system will be made available, etc. _____

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Please list any additional details about the program or company you feel will be helpful for the committee review process: _____

By completing this application and returning it to the NAEPC office, I understand that...

- the product must be discounted specifically for the NAEPC and the cost should be less or equal to other benefit programs by the same company
- company must provide the NAEPC with a 1 – 3 paragraph description of the program that will be posted on the NAEPC website and used in NAEPC newsletters
- company agrees to provide NAEPC with one copy of the program materials and brochure, one complimentary admission to event/conference and one complimentary membership if benefit is a program or service with annual or monthly fees
- company must provide the NAEPC with an online order form or other appropriate procedure for placing orders
- company will provide the NAEPC with a letter if the benefit program is discontinued or discount level is changed
- if accepted, Company will not use the word “endorsed” on any website, brochure or materials associated with the product or service
- if accepted, Company agrees to provide NAEPC with a copy of any printed materials prior to printing or distribution of same
- company understands that the NAEPC’s distribution to the membership of the affiliated local councils is limited to up to six times per year and that NAEPC will not provide a mailing list of council contacts or council members
- company understands that they are not permitted to harvest member contact information from www.naepc.org or the membership roster of any affiliated local council website
- company understands that all benefit partners will be asked to re-apply at two year intervals after initial acceptance

Signature _____ Date _____

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