



FORM FOR COMPLAINT AGAINST AN ACCREDITED ESTATE PLANNER® (AEP®) DESIGNEE

Please provide as much detail as possible on this form and/or in an accompanying letter with supporting documents so that a thorough review by the AEP® Committee Chairperson and Complaint Review Committee, if warranted, is possible.

Contact information for the AEP® designee against whom this complaint is being filed

Name of AEP® Designee: _____

Company Name: _____

Mailing Address: _____

City, State, Zip: _____

Email Address: _____ Telephone: _____

Contact information for the Complaining Party

Name of Complaining Party: _____

Company Name: _____

Mailing Address: _____

City, State, Zip: _____

Email Address: _____ Telephone: _____

Describe in detail the basis for your complaint and the reasons why you believe the AEP® designee named above acted in a manner contrary to the NAEPC Code of Ethics by citing the specific sections of the Code of Ethics that you believe to have been violated:

Signature of Complaining Party: _____

Date: _____

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS