

**HAMPTON ROADS ESTATE PLANNING COUNCIL**  
**Distinguished Estate Planner Award Description and Criteria**

Submit nominations to Jan Dungan, Executive Director, at [admin@hrepc.org](mailto:admin@hrepc.org) by 4/19/2024 at 5 p.m.

The purpose of the Distinguished Estate Planner Award is to honor an individual for outstanding contributions to the field of estate planning. The recipient may currently be engaged in practice or retired but **must have been involved in the field of estate planning for a minimum of 20 years** and **must have been a member of the Hampton Roads Estate Planning Council for at least 10 years** at some point in their career. The recipient should reflect, in practice, the mission and purpose of the Hampton Roads Estate Planning Council:

- To further the education of the members of the council and the public in the field of estate planning;
- To promote cooperation and to foster a better understanding of the proper relationship among estate planners of different professions and
- To provide a better understanding of estate planning and the services that estate planners can render to the general public.

The committee may consider nominee accomplishments in areas including service to the council, teaching, speaking, authorship, professional, civic, or charitable service, service in NAEPC, and creativity or accomplishment in the development of services, products, solutions, legislation, or any other criteria related to the council's goals. This honor is intended to reflect the council's core values and the multi-disciplinary, collaborative approach to estate planning. **No self-nominations.**

**The designations/disciplines that are eligible for nomination are:**

Accredited Estate Planner®  
Attorney  
Certified Financial Planner®  
Certified Public Accountant

Certified Trust & Financial Advisor (TO)  
Certified Wealth Strategist®  
Chartered Advisor in Philanthropy®  
Chartered Financial Analyst

Chartered Financial Consultant®  
Chartered Life Underwriter®

**HAMPTON ROADS ESTATE PLANNING COUNCIL**  
**DISTINGUISHED ESTATE PLANNER AWARD NOMINATION**

**I recommend for this award:**

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_  
Company: \_\_\_\_\_ Years in Field \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Email: \_\_\_\_\_  
Professional Degrees/Designations: \_\_\_\_\_  
Email: \_\_\_\_\_

**Please make a statement in support of your nomination here or attach a separate document:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please attach a resume, CV, or similar document for your nomination, if available.

Submitted

by: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_