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FOR IMMEDIATE RELEASE

Michelle Clary, Named an ACCREDITED ESTATE PLANNER® Designee
by the National Association of Estate Planners & Councils on March 16, 2022.

Cleveland, Ohio – Michelle Clary is newly certified as an Accredited Estate Planner® (AEP®) designee by the National Association of Estate Planners & Councils (NAEPC). Designee's office is Piton Wealth.

Michelle Clary has earned multiple significant financial certifications, including four of the most respected and advanced designations in the financial industry; Certified Financial Planner®, Certified Life Underwriter®, Chartered Financial Consultant® and Retirement Income Certified Professional®. She has been in the financial industry for over 20 years, advising clients around the country in faith-based wealth management. Clary's unique partnership with the executive leadership of Fortune 500 company, Thrivent, has allowed her to play a key role in the 2018 launch of the Thrivent Advisor Network. Prior to founding Piton Wealth, Clary was among the top 1% of Thrivent advisors in the nation for client satisfaction and practice production measures. Clary and her team at Piton Wealth are dedicated to philanthropic and charitable efforts. Clary continues to receive industry designations in her pursuit to be an advocate for her clients as she guides them through the complexities of financial planning.

The Accredited Estate Planner® (AEP®) designation is a graduate level, multi-disciplinary specialization in estate planning, obtained in addition to already recognized professional credentials within the various disciplines of estate planning. The AEP® designation is available to actively practicing attorneys (JD) and Certified Public Accountants (CPA); or those currently designated as a Chartered Life Underwriter® (CLU®); Chartered Financial Consultant® (ChFC®); Certified Financial Planner (CFP®); Chartered Financial Analyst (CFA); Certified Private Wealth Advisor® (CPWA®); Chartered Advisor in Philanthropy® (CAP®); Certified Specialist in Planned Giving (CSPG); or Certified Trust & Fiduciary Advisor (CTFA).

It is awarded by the National Association of Estate Planners & Councils to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character. An AEP® designee must embrace the team concept of estate planning and adhere to the NAEPC Code of Ethics, as well as participate in an annual renewal and recertification process.

NAEPC is a national organization of professional estate planners and affiliated local estate planning councils dedicated to the cultivation of excellence in estate planning. NAEPC fosters the multi-disciplinary approach to estate planning by serving estate planning councils and their credentialed members and delivering exceptional resources and unsurpassed education.

For more information or to schedule an interview with Julie A. Buschman, CPA, AEP®, CAP®, NAEPC president, please contact Susan Austin Carney at 866.226.2224 or susan@naepc.org.