



PRESS release

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Kelli Lewis, named an ACCREDITED ESTATE PLANNER®!

Clayton, Missouri - Kelli S. Lewis, CPA is newly certified as an Accredited Estate Planner® (AEP®) by the National Association of Estate planners & Councils. Lewis is a Principal in the Tax and Business Services department at Clayton, Missouri based - Stone Carlie & Company, L.L.C., certified public accountants, business consultants and wealth advisors.

The Accredited estate planner® designation is a graduate level 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 attorneys (JD), Chartered Life Underwriters® (CLU®), Certified Public Accountants (CPA), Certified Financial Planners™ (CFP®), Chartered Financial Consultants (ChFC®), and Certified Trust and Financial Advisors (CTFA). It is awarded by the National Association of Estate Planners & Councils (NAEPC) to recognize estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character. An AEP® designation holder must embrace the team concept of estate planning and adhere to the NAEPC Code of Ethics.

The National Association of Estate Planners & Councils (NAEPC) is a national organization of professional estate planners and affiliated local Estate Planning Councils focused on establishing and monitoring the highest professional and educational standards. NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards. NAEPC builds a team approach involving cross-professional disciplines to better serve the public's need in estate planning.

Stone Carlie & Company, L.L.C. is a provider of tax and business advisory services to small and medium-sized companies and their owners and executives in the Midwest region. Stone Carlie has over 60 years of experience in providing extensive business and individual services including all levels of tax preparation and tax planning services, assurance services, Financial Insights Services, Tax Insight Services, strategic business planning, executive financial planning, financial education workshops, investment advisory services and estate and succession planning. Stone Carlie also provides valuation services, business performance reviews, merger and acquisition services, CFO Solutions, and healthcare consulting including medical practice management.