

## 2022 Notice: Your CEPA Credential Renewal is Due

**CEPA Renewal Requirements:** The Certified Exit Planning Advisor (CEPA) credential must be renewed every three (3) years and **your next CEPA cycle expiration date is Saturday, December 31, 2022.** To maintain your earned designation, you must complete (1) ongoing adherence to professional conduct requirements and 2) continual professional development activities, or a combination of professional development activities and contributions to the profession; as outlined below:

1. **Meet Minimum Continuing Education Requirement:** Renewing certification holders must have completed a minimum of 40 hours of exit planning related professional development, or a minimum of 30 hours of exit planning related professional development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the exit planning profession. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect, or officer for committee service to a qualifying organization other than the applicant's employer.
2. **Maintain Professional/Ethics Standards:** Renewing certification holders must agree in writing that they will adhere to the EPI Professional Standards and Code of Ethics, and they must re-attest that they have not been convicted of a felony related to the practice of exit planning.

**Renewal Fee & Expiration:** For each three-year period, there is a renewal fee of \$165. The fee must be paid when the Renewal form is submitted. This fee can be waived by registering for an upcoming Exit Planning Summit event.

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## Qualifying Professional Development Activities:

*You will receive continuing education credits as outlined below for the following items:*

- Serving on the CEPA Faculty: 2 CEPA credit hours per session/topic per year (max: 8 hours per cycle)
- Presenting a session at any EPI conference: 2 CEPA credit hours per session/topic (max: 12 hours per cycle)
- Serving as a Board of Directors Chair or a standing committee chair: 1 CEPA credit hour per meeting (max: 6 hours per cycle)
- Presenting at a non-EPI conference for educational purposes: 2 CEPA credit hours per session/topic (max: 8 hours per cycle)
- Published articles: 2 CEPA credit hours for each article published in a recognized publication
- Live CE Event: 1 CEPA credit hour credit for each 60 minutes of education (group live or online monitored), subject to approval from the EPI CE Coordinator, offered by EPI or any major organization such as NACVA, AICPA, AMAA, CFP Board, IBBA, IMCA, FPA et al. (For example, a program that runs 120 minutes would count as 2 CEPA credits).

On the following page, please indicate the total number of hours you have submitted for credit and provide a detailed listing for each program or activity. **There is no requirement to attach documentation or proof of attendance at educational events or background information.** It is up to the CEPA member to keep track of all continuing education programs for submission at the proper time. The Exit Planning Institute reserves the right to request an audit documentation confirming the information reflected on your application.

**Complete and return page 2 to EPI Member Experience Representative by Saturday, December 31, 2022.**

Please indicate the total number of hours you have submitted for credit and provide details for each credit submission.

**Please sign and submit form to Exit Planning Institute:**

By signing, I hereby attest that the information provided is a complete and accurate record of my continuing education participation during the time period of January 1, 2020 through December 31, 2022.

**CEPA Full Name:**

**SIGN HERE:**

Submission Date:

*In order to maintain the CEPA credential, an active EPI Annual Credentialed Membership must be maintained. In the case the Annual Credentialed Membership is not maintained, the CEPA credentials will be de-activated and membership terminated. An applicant will be ineligible for renewal if their EPI Annual Credentialed Membership is past due. Please contact with questions.*