CEPA Credential Recertification Attestation Form

CEPA Credential Continuing Education Renewal Requirements: The Certified Exit Planning Advisor (CEPA) credential must be renewed every three (3) years via continuing education and **your next CEPA cycle expiration date is available to see inside your Member Center.** 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 Requirements:** Renewing certification holders must have completed a minimum of 40 hours of exit planning related professional development. EPI accepts reciprocal CE hours from CPE, CFP, etc. EPI, however, does not accept ethics as CE.
   o 20 of the above hours need to be from the Exit Planning Institute in the form of programs, courses, and meetings. These include the Exit Planning Summit, EPI Academy, Chapter Events, Think Tanks, Webinars, etc.
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.

Qualifying Professional Development Activities:

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

- Attending the Exit Planning Summit: Qualifying for a minimum of 15 CEPA credit hours
- Completing an EPI Academy course: 1 CEPA credit hour per course hour
- Attending an EPI Chapter Event: 1 CEPA credit hour per event hour
- Attending a CEPA Think Tank: 1 CEPA credit hour per event hour
- Attending an EPI webinar: 1 CEPA credit hour per event hour
- Serving on the CEPA Faculty: 2 CEPA credit hours per session presented
- Presenting a session at any EPI conference: 2 CEPA credit hours per session/topic
- You may receive 1 Non-EPI credit hour for each 60 minutes of education, subject to approval from the EPI CE Coordinator, offered by 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 Non-EPI credits).

First-time attendees of the Certified Exit Planning Advisor program DO NOT receive EPI credit hours for completion of the program.

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 of documentation confirming the information reflected on your application.

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Complete and submit the following form utilizing the CE Tracker inside your EPI Member Center Account.

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

Type	Date CE Taken	Organization	Course/Program Title	CE Hours / CEPA Credits
Total CEPA credit / CE Hours Reported ⇨				

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 period of my three-year continuing education window.

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.