

## 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:

- 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.
  - 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.
- 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.

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## 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 EPI credit hours
- Completing an EPI Academy course: 1 EPI credit hour per course hour
- Attending an EPI Chapter Event: 1 EPI credit hour per event hour
- Attending a CEPA Think Tank: 1 EPI credit hour per event hour
- Attending an EPI webinar: 1 EPI credit hour per event hour
- Attending a New CEPA Next Steps call: 1 EPI credit hour
- Serving on the CEPA Faculty: 2 EPI credit hours per session presented
- Presenting a session at any EPI conference: 2 EPI 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.

