CEPP™ CHARTERED ESTATE PLANNING PRACTITIONER

Professional Designation Program

Exciting News

For Financial, Insurance, Securities and other Professional Advisors

Senior Needs L.I.F.E. –Legal, Insurance, Financial, Estate Planning and Asset Preservation. Training – Focuses on Proper and Essential Steps, Strategies – Including all Financial and Insurance Products for Wealth Building, Asset Protection, Long Term Care and Quality of Life Solutions. CEPP Includes; Compliance, Errors and Omissions Issues, Do's and Don'ts, - Helping Financial, Insurance, Legal Experts Properly Present and Build an Estate Planning Practice Working with Local Professionals.

CEPP is designed for financial, insurance, securities, banking, accounting, employee benefit and other professional advisors that work with families, individuals, groups and Seniors on matters of Asset Protection, Retirement, Long Term Care, Financial, Income and Estate Planning Issues. CEPP is not a designation that certifies you as an estate planning expert. It is only a designation that shows you are a student of estate planning process and that you are committed towards continuing education in the industry and that you do not work alone, but with a team of legal and financial professionals. CEPP professionals are committed to education as humble students respecting the seriousness of the industry and honoring the discipline of proper and essential steps of doing complete asset protection and estate planning assessments working with a team of professionals.

CEPP will help towards providing you with practical experience as you complete the steps of doing your own estate planning to prepare to meet with an attorney. Experience is an important step when you're going to be offering asset protection and estate planning assessment services to the public. Also as importantly CEPP Program helps you market, build and protect your practice while you strive foremost to protect your client's assets and help reduce or avoid E&O Claims.

CEPP Graduates pride themselves in striving to educate other Professionals and the Public on matters of Retirement-Long Term Care - Estate Planning, caring for the elderly and providing multi-generational estate planning to protect America's assets one family at a time!

Its Easy, Enjoyable and Self Paced

3 Easy Segments Towards
CEPP Designation in 30 days!

The Ultimate Online Learning Experience

Look What CEPP Members Enjoy Within 30 days

- **Accelerated Success and Increased Income**
- **Legal, Insurance and Financial Training**
- **Knowledge of Avoiding and Reducing E & O Law Suits**
- **Completing your own estate planning with CEPP Segment One**
- **Studying Online at your own pace**

CEPP GRADUATES Enjoy Greater Success With Workshop Training and Support:

- **Seminar / Workshop Training with Significant Savings and Results**
- **Professional Products - Power Point Slides, Flyer Templates, Expert Video Tools**
- **Career Management Resource Center for coaching**
- **Expert Network Assistance, Product Training**
- **A Library of books, topics, ranging from: State and Federal law to Insurance products to Estate Planning**
- **And Much, Much more...**

Estate Planning Institute

Estate, Retirement, Financial and Long Term Care Planning Education Resource Center

The Ultimate Online Learning Experience Enjoyable Reading - 30 Day Self Study Program. Valuable Legal, Insurance Financial Elder Law Information You Won't Find Elsewhere.

CEPP is especially designed to provide you with practical experience in approaching an estate planning case by conducting a more thorough and proper asset protection and estate planning assessment. Then, working with a team of professionals provide solutions to complete in a timely manner a comprehensive and essential asset protection and estate plan that suits the need of the client and family. CEPP also helps you market, build and protect your practice and reduce or avoid E&O claims. **Segment One Includes doing your own estate planning assessment - preparing you to have legal documents prepared by an estate planning attorney.**

CEPP Designation Program has 3 segments. Each segment is designed to complete in a weekend or at your own pace. **Each course is downloaded from your computer** and you can print or read online. When you are ready - you with a proctor take the exam online - closed book. You have 2 hours for each multiple-choice exam. Segment one and two have 100 questions. Segment three has 50 questions. When you've completed all three exams with all requirements being met - you will receive your CEPP designation and certificate within 30 days in the mail. (Classroom program with instructor for groups of 12 or more may be available upon request - fee based).

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CEPP Segment One

Part 101

Part 102

CEPP Segment Two –

Completes LPA Certification for non licensed professionals ONLY

Part 103 for Licensed Professionals for CEPP Designation

Part 104

CEPP Segment Three

Enroll Now by Credit Card Completing the below form and faxing to 703 852 4444

Your CEPP-EPI Oath with Enrollment

I have reviewed and agree to abide by the laws of the state of my professional license and the Code of Professional Ethics adopted by the national professional organization of my profession and the state organization's Code of Professional Ethics and also the Code of Professional Ethics of the Estate Planning Institute http://www.agent-central.com/ls/assoc.htm I pledge to support, cooperate, and assist my fellow CEPP-EPI members with honor, integrity, teamwork and due diligence. I understand that I do not practice law, nor provide any legal advice unless I am licensed to do so.

CEPP-EPI Enrollment Memorandum of Understanding and Agreement

I am committed to working with a team of professionals, dedicated to protecting assets one family at a time. I will strive to obtain estate planning awareness and educational programs in my community and to assist other CEPP-EPI members to do the same. I dedicate my practice to help raise awareness for the care of the elderly and to bring families together to care for each other with multi-generational estate planning.

I understand that CEPP is NOT a designation that certifies you as an estate planning expert. It is only a designation that shows you are a student of estate planning process as a practitioner and that you are committed towards continued education in the industry and that you do not work alone, but with a team of legal and financial professionals. CEPP professionals - are committed to continued education as humble students respecting the seriousness of the industry and the discipline of proper and essential steps of doing complete assessments - working with a team of professionals. I understand that no legal services are provided for CEPP members or their clients through EPI. I understand that no legal services are offered or rendered through the Estate Planning Institute and that no memberships are transferable or re-salable to any other individual, firm or entity. I understand that (1) all educational material provided in the CEPP program is the confidential proprietary property of EPI and is intended solely for the educational purposes of the CEPP student. None of this material may be modified or duplicated other than for student CEPP educational purposes, edited or shall it be distributed to any other person without the written permission of EPI; (2) all tuition is nonrefundable; (3) any disputes involving legal action shall be construed according to Virginia law and only through the Virginia court system; (4) EPI may change and/or modify any part of the CEPP program including designation(s) without prior notice; (5) a professional designation such as CEPP represents the completion of the education program only and that CEPP only has the integrity, competence, professional image and confidence to the public that the CEPP graduate represents to peers, clients and the general public; (6) that there is no procedure in most states for approving or certifying professional organizations. (7) That EPI has no responsibility of any actions of CEPP graduates in any way.

I have read, understood and agree to the above terms for enrollment for the CEPP professional designation program of The Estate Planning Institute. I understand that any unethical or illegal actions by me as perceived by the Estate Planning Institute could terminate my CEPP-EPI membership and designation with the Estate Planning Institute,

Signature: ________________________**Date**_______
Witness: _________________________**Date** ______
Witness Print Name: _________________ **Date** ______
Address: _______________________________________**City**_____________
State_____ ________**Zip**___________
Phone: ____________ **Email** ___________________________

The Estate Planning Institute (EPI)
P O Box 669 - Luray, VA 22835
Fax: 703 995 0320
Credit Card Enrollments Complete below or
Call: 800 750 9110

Member's Name: ______________________**Phone:** ______________________
Address: _________________________**City:** ________________ **State:** ______
Zip: _________ **Email**___________________ **Cell Phone:** ________________
VISA ____ **AMEX.** ____ **MASTERCARD** ____ **Discover** ____
Credit Card Number: _______________________**Expiration Date:** ________
Mother's Maiden Name: ___________________________
Signature _____________________________ **Date:** ____
Billing Address: (If Different from Residence)
Street: ____
City: ________________**State:** ____________**Zip**___________

What CEPP Members Are Saying... "The Chartered Estate Planning Practitioner course was eye opening, practical, easy to read, with valuable substance. I highly recommend this course for brokers, agencies and any financial professionals who are looking to protect their client's assets and quality of life. " Thanks, MS

ANNUAL CERTIFICATION

To maintain Current Status of CEPP membership through EPI, Eight Estate Planning Continuing Education Credits are required every 2 years through EPI. Courses are available through EPI - December is the deadline for each year.

CEPP annual certification and membership fee is $150.00. Benefits include being able to continue use of any CEPP materials and member benefits. CEPP Continuing Education courses are provided fee based.

ENROLLMENT FEES

Each Segment is $350 that includes the exam.
Save $100 if you pay for 3 segments at enrollment.
Credit Card Enrollment Call 800 750 9110
Call for information on group discounts of 12 or more.

LPA Life Planners Advocate
Enrollment uses this form.
LPA Course Certification is $759 first two segments only

CEPP Permanent Record Enrollment Information
The next section must be completed and faxed or mailed in (along with a copy of your professional license and a photo ID for our records and a business card with this enrollment form) before your CEPP matriculation can be completed.
We do not share any information - we do protect your privacy.

Name:_________________________________
(Exactly as you would like it to appear on Membership Certificate)
Nickname:________________________________
Social Security Number: _______________________
DOB:__________________________________
Business Name:____________________________
Business Address:__________________________
City:___________________________________
State: __________________________________
Zip: ___________________________________
Phone: _________________________________
Fax: ___________________________________
Pager: _________________________________
Email: _________________________________
Resident Address: __________________________
City: ___________________________________
State: __________________________________
Zip: ___________________________________

EPI OFFICE HOURS:
Mon. - Fri. 9 AM -5 PM EST
540 743 1733
Fax Enrollment Forms to: 703-995 0320
24 hr. Credit Card Enrollment 1-800-232–6465
(Fax this enrollment form with credit card enrollment)
Or use web site enrollment form: www.cepp-epi.com
Thank You for Your Enrollment Application. If we can assist you further, please call:
1 800 750 9110. Upon approval for online studies you will receive your CEPP Password and username along with your receipt of payment.