

**Student and Emerging Estate Planners Outreach
and Membership Program (SEEPOMP) Guidelines**

Overall CAEPC Objectives:	<ul style="list-style-type: none"> • educate members, to obtain a broader perspective of pertinent issues and ideas in the Estate Planning Field • emphasis on building/enabling the estate planning team • professional networking opportunities 			
SEEPOMP Objectives:	<ul style="list-style-type: none"> • maintain the vibrancy of CAEPC by encouraging CAEPC membership among young estate planners • provide a bridge for networking between students, young professionals, and seasoned estate planners 			
SEEPOMP Membership Category	<p>Student and Emerging Planners selected will be considered non-voting members of the CAEPC for one fiscal year. Their dues will be paid by the CAEPC. They will not be represented on the board of directors. Their membership may be renewed at their discretion for up to 2 years at ½ price, with or without meeting other membership criteria, as an Emerging Planner. Up to 4 Emerging Planners may be chosen in any fiscal year. Once successfully granted an Emerging Planners Membership, a winning candidate may not apply again in future years.</p>			
SEEPOMP Candidates	<p>In order to be a candidate eligible to apply for a Student and Emerging Planners Membership, the applicant must be:</p> <ul style="list-style-type: none"> • Beginning their estate planning careers or making a significant redirection in their career toward the estate planning profession • Be in a career phase whereby a financial need is substantiated • Have a Bachelor’s degree or have attained one prior to their joining CAEPC, and be in a graduate program full-time and/or working on a degree or designation consistent with the requirements for CAEPC full membership • The SEEPOMP Committee will evaluate candidates based on the application matrix in effect at the time, but also with a degree of flexibility in recommending the best candidate(s) according to their overall qualifications appropriate for full CAEPC membership 			
SEEPOMP	<ul style="list-style-type: none"> • By early August, the SEEPOMP Committee will send an outreach letter 			

Outreach Efforts	<p>and application information to the list of educational facilities and programs (as updated and/or increased annually by SEEPOMP) approved by the CAEPC board. Such list shall include, for example, law programs, accounting programs, actuarial and appraisal programs, non-profit fundraising and management programs, CLU, CFA, CFP, and CTFA programs</p> <ul style="list-style-type: none"> • the minimum number of outreach programs and schools contacted shall be 10 • the program and related applications shall be prominently posted on the Chapter website • the program shall be marketed to/from current CAEPC members and firms
SEEPOMP Application and Acceptance Process	<ul style="list-style-type: none"> • interested applicants must submit their completed application to the CAEPC, via the administrative office, no later than the second week in September of any year • the SEEPOMP Committee will develop an objective and quantifiable review matrix for the SEEPOMP to utilize in ranking applicant applications, and update/improve this tool as needed • review all applications received by the beginning of September of any year, and report totals back to the administrative office • receive the complied rankings of all applicants from the administrative office and recommend winning applicants to the board at the September Board meeting • notify applicants after the September board meeting with the results no later than the last week in September • confirm applicants acceptance • confirm applicant can attend at least 6 meetings
SEEPOMP Mentor	<p>The SEEPOMP Committee will assign each Student or Emerging Planner a committee member, to act as their host at all CAEPC functions (introductions to other members, assistance in understanding program content or perspective, transportation or other special needs).</p>
SEEPOMP Membership Committee	<p>SEEPOMP shall be comprised of:</p> <ul style="list-style-type: none"> • at least 4, but not more than 6, members • at least ½ of the members serving on the CAEPC board of directors • active and qualified members of the CAEPC • willing to meet the deadlines as established in the application process • CAEPC will encourage the past presidents to consider service on SEEPOMP
Conflicts of Interest	<p>No SEEPOMP Committee member shall in any way influence the application process or decision of any applicant who is related to, or</p>

	personally known by, such committee member.
Budget	<p>The Emerging Planners Membership Program shall be in the annual CAEPC budget for the following amounts:</p> <p>Year 1: \$ 1700 (4 membership fees paid by CAEPC) \$ 425 one time guest attendees/prospective applicants</p> <p>Year 2: \$ 1700 (4 membership fees paid by CAEPC) \$ 425 (one time guest attendees/prospective applicants) \$ 850 (if 4 members renew at ½ price)</p> <p>Year 3: an additional \$850, if 8 membership renew at ½ price</p>
SEEPOMP Sponsorship	<p>CAEPC will add to its sponsorship opportunities list the Emerging Planners Sponsorship category (for up to 2 emerging planners), for \$1,000 annually. An additional sponsor (in the event of 3-4 emerging planning) for \$1,000. The first sponsor shall have a first right of refusal. Sponsorship terms for the 2nd and 3rd years will be determined by the SEEPOMP depending on the number of candidates renewing. The SEEPOMP Committee will seek potential sponsorships.</p> <p>Emerging Planners Sponsors will receive the following recognition:</p> <ul style="list-style-type: none"> • listing, with logo, on the web page and program applications • listing, with logo, on the Emerging Planners Roster page (on website) • ability to introduce “their emerging planner(s)” at the October membership meeting • ability to graduate “their emerging planner(s)” at the May membership meeting

Committee Members: Mary Budzien (Chair) ; Joe McCabe; Steve Taddie; Tom Maguire (Past President); Maria Moreno (Current President)

Revised 2009, August 12th/Board Approved