

CENTRAL ARIZONA ESTATE PLANNING COUNCIL
EMERGING PROFESSIONALS GROUP
EPG PROGRAM and GUIDELINES

CAEPC Objectives	<ul style="list-style-type: none"> - Educate members, to broader and deeper perspective of pertinent issues and ideas in the estate planning field. - Emphasize building and encouraging the estate planning team. - Provide professional networking opportunities.
EPG Objectives	<ul style="list-style-type: none"> - Maintain vibrancy of CAEPC by encouraging CAEPC Associate Membership among young estate planners. - Provide a bridge for networking between students, young professionals and seasoned estate planners.
EPG Membership Category	<p>CAEPC Associate Members:</p> <ul style="list-style-type: none"> - All CAEPC Associate Members who meet the EPG candidate guidelines below are automatically included in the EPG. - All regular CAEPC Associate Membership guidelines apply. <p>EPG General:</p> <ul style="list-style-type: none"> - EPG events held throughout the fiscal year may be attended by young estate planning professionals who meet the EPG candidate guidelines below. - EPG general event attendees are <i>not</i> CAEPC Associate Members. - EPG general event attendees may apply at any time for CAEPC Associate Membership. All regular CAEPC Associate Membership guidelines apply.
EPG Candidates	<p>In order to be a candidate for the EPG, the individual must be:</p> <ul style="list-style-type: none"> - Beginning their estate planning career <i>or</i> making a significant redirection in their career toward the estate planning profession (i.e. less than forty (40) years of age <i>and/or</i> less than ten (10) years' experience).

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EPG Outreach Efforts & Events	All CAEPC Associate Members shall encourage young estate planning professionals to attend EPG events. The EPG Planning Committee shall make efforts to increase the EPG event attendee list with young estate planning professionals who are qualified candidates for full CAEPC Associate Membership. The EPG Planning Committee shall host a reasonable number of EPG events throughout the membership year.
EPG Fees	<ul style="list-style-type: none"> - Current CAEPC Associate Members who qualify for EPG may be listed on the EPG web page at no charge, upon request. - The EPG Planning Committee may charge an appropriate per event fee for attendance at each EPG Event held throughout the CAEPC fiscal year (Amount of fee determined by EPG Planning Committee on a per event basis). - EPG Web Listing is available for an additional cost as determined by the CAEPC Board. This allows the EPG individual to register their name and contact information on the EPG web page. - EPG Intro Registration is available for an additional cost as determined by the CAEPC Board. This allows the EPG individual to register their name and contact information on the EPG web page, <i>and</i> allows for attendance at one (1) CAEPC general meeting held during such fiscal year. (Excludes the Holiday Social and February Half-Day program).
EPG Committees	<p>EPG Planning Committee:</p> <ul style="list-style-type: none"> - Shall be comprised of at least four (4), but no more than ten (10) individuals. - At least one (1) EPG Planning Committee individual shall serve on the CAEPC Board of Directors. - All individuals on the EPG Planning Committee must be active and qualified CAEPC Associate Members. - Must meet the EPG Candidate guidelines. - Must be able to attend at least eighty percent (80%) of the EPG events and planning sessions.

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	<p>EPG Scholarship Committee:</p> <ul style="list-style-type: none"> - Shall be comprised of at least three (3), but no more than five (5) individuals of the EPG Planning Committee. - One of the three individuals shall be the EPG Planning Committee Chair.
<p>Budget</p>	<p>The EPG program may be funded by CAEPC, as determined in the fiscal CAEPC budget for the following expense categories:</p> <ul style="list-style-type: none"> - EPG Outreach Efforts & Events - EPG Scholarship Recipient Meals
<p>EPG Event Sponsorship</p>	<p>CAEPC may offer sponsorship opportunities for the EPG events (for up to five (5) events per fiscal year). Each EPG Event sponsorship shall be for \$500 per event. Additional EPG Event sponsorship opportunities may be added as needed at the same rate of \$500 per sponsor. Both the number of event and cost of sponsorship can be adjusted upon recommendation of the EPG Chair and approval of the Board.</p> <p>EPG Event Sponsors receive:</p> <ul style="list-style-type: none"> - Recognition at the sponsored EPG Event (remarks and/or material at event as appropriate). - Recognition on the designated EPG Event Invitation for the sponsored date. - Listing, with logo, on the EPG web page

Revised 2015, Board Approved 2015