

CENTRAL ARIZONA ESTATE PLANNING COUNCIL
EMERGING PROFESSIONALS GROUP
EPG SCHOLARSHIP GUIDELINES

<p>EPG Scholarship Candidates</p>	<p>In order to be a candidate for the EPG Scholarship, the individual must be:</p> <ul style="list-style-type: none"> - Less than forty (40) years of age or less than ten (10) years' experience. - Be in a career phase whereby a financial need is substantiated. - Be enrolled in or have completed an undergraduate or graduate school program or working on a degree or designation, consistent with the requirements for full CAEPC Associate Membership.
<p>EPG Membership Category</p>	<p>EPG Scholarship Recipients:</p> <ul style="list-style-type: none"> - Recipients will be considered CAEPC Associate Members for one fiscal year. - Annual dues will be paid by CAEPC. - CAEPC Associate Membership may be renewed at the Scholarship Recipient's discretion for up to two (2) years at one-half (1/2) price regular dues. - Up to three (3) Scholarship Recipients may be chosen in any fiscal year. - A Scholarship Recipient may not apply in future years. - EPG Scholarship Recipients are automatically included in the EPG.
<p>EPG Scholarship Outreach</p>	<ul style="list-style-type: none"> - The EPG Scholarship Committee will send outreach letters and application information to a list of educational facilities and programs (as maintained and updated annually). Such list may include the following programs: law, accounting, actuarial and appraisal, non-profit fundraising and management, CLU, CFA, CFP and CTFA. - A reasonable number of educational facilities and programs shall be contacted annually. - The EPG Scholarship shall be prominently posted on the CAEPC website. - All CAEPC Associate Members shall encourage EPG Scholarship candidates to apply.

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<p>EPG Scholarship Application & Process</p>	<ul style="list-style-type: none"> - The EPG Scholarship Application shall be available on the CAEPC website. - Applicants must submit a completed application to the EPG Planning Committee Chair by the stated application deadline. - The EPG Scholarship Committee shall develop and maintain an objective and quantifiable review matrix to utilize in ranking applications. - The EPG Scholarship Committee shall review all applications received and record matrix totals. - The EPG Planning Committee Chair shall present the compiled rankings of all applicants and recommend winning applicant(s) to the Board of Directors. - Upon Board approval, the EPG Scholarship Committee shall notify all applicants with the results. - The EPG Scholarship Committee shall confirm the winning applicant(s) acceptance and attendance for at least six (6) CAEPC general meetings.
<p>EPG Mentor</p>	<p>The EPG Planning Committee shall assign each EPG Scholarship Recipient an EPG Planning Committee member or a Board Member, to act as their host at all CAEPC and EPG functions. Hosting may include introductions to other members, assistance in understanding program content or perspective, transportation or other reasonable needs.</p>
<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>Conflicts of Interest</p>	<p>No EPG Committee member shall in any way influence the application process or decision of any applicant who is related to, or personally known by, such committee member.</p>

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EPG Scholarship Sponsorships	<p>CAEPC may offer sponsorship opportunities for the EPG Scholarship programs (for up to three (3) Scholarship Recipients). Each EPG Scholarship sponsorship shall be for \$1,000 annually. Additional EPG Scholarship sponsorship opportunities may be added as needed at the same rate of \$1,000 per sponsor. Both the number of sponsors and cost of sponsorship can be adjusted upon recommendation of the EPG Chair and approval of the Board.</p> <p>EPG Scholarship Sponsors receive:</p> <ul style="list-style-type: none">- Listing, with logo, on the CAEPC Sponsorship web page and EPG web page- Remark at the October membership meeting- Ability to introduce their Scholarship Recipient at the October membership meeting- Ability to graduate their Scholarship Recipient at the May membership meeting- Recognition at the first EPG Event of the season
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Revised 2015, Board Approved 2015



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Council

David Walser, President
Darren Case, Vice-President
Darlene Hagan, Treasurer
Kyle Decker, Secretary
Steve Taddie, Past President

2015-2016

2015-2016

Emerging Professionals Group (EPG)

Application for Scholarship to Central Arizona Estate Planning Council (CAEPC)

Name: _____

Educational Program: _____

Date of Completion: _____

Degree and/or Designation: _____

*Address: _____

*Phone Number: _____

*Email Address: _____

**To be published in the CAEPC Directory.*

Statement of interest in CAEPC Associate Membership:

Please write a paragraph explaining your interest in a 2015-2016 CAEPC associate membership.



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2015-2016

Statement of Financial Need:

Please explain why you may have a financial need for a 2015-2016 CAEPC associate membership.

Statement of Goals:

Please explain your goals as an emerging planner in the field of estate planning.

Please attach a resume and/or transcript for scholarship application

(DEADLINE FOR SUBMITTING APPLICATION IS JUNE 30th)

Please submit application and material to Remy Carpenter at remy.carpenter@bmo.com

Central Arizona Estate Planning Council
in care of: Premium Organization
PO Box 4130, Scottsdale, Arizona 85261-4130

www.caepc.org

Phone: 602-840-2900 E-mail: info@CAEPC.org Fax: 480-922-5283