



2025-2027 Emerging Leaders Program Application

APPLICATION FOR CEPC'S 2025-2027 EMERGING LEADERS PROGRAM

Name: _____
Position: _____
Organization: _____
Address: _____
City, State, Zip: _____
Email: _____ Phone: _____

*The Council promotes and encourages diversity in the estate planning profession at all levels.
Please Note: Application Deadline is April 15, 2025.*

Optional Questions:

Race and/or Ethnicity: _____
Do you have a visible or non-visible disability? ___ Yes ___ No
Do you identify as LGBTQIA+? ___ Yes ___ No
Is there anything else not covered by the above questions that you would like for us to know about your background as it relates to diversity? _____

Credential: (Select all that apply)

J. D. ___ Certified Public Accountant ___ Certified Life Underwriter ___
Chartered Financial Consultant ___ Certified Financial Planner ___ American Society of Appraisers ___
Certified Trust and Financial Advisor ___ TR ___ Other _____

_____ Year Designation Obtained; OR
_____ If in process of obtaining designation, year designation expected

Overall percentage of time in current position spent on estate planning: _____

Practice Area: (Select all that apply)

Law ___ Accounting ___ Life insurance ___ Financial planning ___ Wealth Management ___
Trust and estate administration ___ Planned Giving ___ Valuation Service _____

Length of time that you have been involved with estate planning: _____

Other affiliations or employers related to estate planning:

Name and Position: _____

Date: _____

Address: _____

Nature of Work: _____

Please name any professional organization(s) in which you are now an active member:

1. Describe why you are interested in the estate planning field. (Please attach your response)
2. Describe your experience in the estate planning field. Include any speaking or writing opportunities and participation and leadership in estate planning organizations. (Please attach your response)
3. Briefly state why you are interested in being appointed as a CEPC Emerging Leader.
(Please attach your response)

Please email CEPC your completed application by April 15, 2025 to: info@cepcweb.org

If I am not selected for this year's EL Program, please add me as a new Emerging Member.
(Dues: Full-time Student - \$0 _____ Emerging Member - \$60 annual membership dues _____)