



2022-2024 Emerging Leaders Program

Application

JNJ & ASSOCIATES, LTD



THE CHICAGO COMMUNITY TRUST
AND AFFILIATES



SHEPARD SCHWARTZ & HARRIS LLP
CPAs & BUSINESS ADVISORS





APPLICATION FOR CEPC'S 2022-2024 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 June 30, 2022.

Optional Questions:

Race and/or Ethnicity: _____

Do you have a disability? ___ Yes ___ No

Do you identify as LGBTQ? ___ 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? _____

Qualification: (select one)

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 one if you do have or are not seeking a recognized qualification):

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 June 30, 2022 to: info@cepcweb.org

