The activities of your "Elder Planning Counselor" adhere to these principles of the "Code of Conduct":

1. **Place the needs, objectives and interests** of their clients, customers, patients and prospects above their own at all times.

2. **Protect their clients, customers, patients and prospects** from unscrupulous business and professional activities.

3. **Give clients, customers, patients and prospects the same advice and service** they would expect themselves if the circumstances were the same.

4. **Keep confidential** all personal and business details of their clients' affairs they become aware of during the course of their work.

5. **Keep the quality of their recommendations high** through continuing education and training.

6. **Abide by the letter and spirit of the law** or any applicable regulations or professional codes in all their business or professional activities.

7. **Shield the CIEPS and fellow EPCs from dishonour** by agreeing to immediate suspension of their membership if charged with a criminal offense or professional misconduct.

8. **Charge a fair and appropriate fee** (If on a fee for service basis) based on the time, skill and expertise required.

Look for the unmistakable EPC "Mark of Excellence" when you are looking for business and professional advice from someone who really cares about Established and Elder Canadians.

Check out the CIEPS Web Site for more information on the Elder Planning Counselor at; www.cieps.com

Meet your local EPC

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EPC
ELDER PLANNING COUNSELOR

Your Assurance of Excellence for Professionals Serving Elder Canadians

Work With People who understand you… Deal With an "Elder Planning Counselor" … An "EPC"

If you are part of Canada's largest, growing Population segment, the 55 Plus crowd – The Golden Generation - then you'll profit by working with an EPC. As an Established and Elder Canadian, you have earned the right to deal with business and professional advisors who are educated in issues important to you. These people:

- Know and understand the issues and alternatives that are important and unique to senior life.
- Respect your circumstances and confidentiality.
- Provide guidance and assistance with your best interests in mind.
- Create solutions that acknowledge your concerns and challenges.
- Inconspicuously accommodate any age appropriate physical challenges and impairments that you may have to ensure your needs are met.

What Do We Believe?

The **Canadian Initiative for Elder Planning Studies** believes that working with established and elder clients requires an overall understanding of all your relevant concerns. These needs evolve from your wage-earning years and continue to change as you get more established and age.

The **"*EPC*"** curriculum meets this objective through a comprehensive Education Program designed to recognize these needs and provide business and professional advisors in North America with the essential knowledge and tools that are necessary to effectively develop trust and money saving practical solutions. And, their education doesn't stop on graduation either. Your EPC professional is required to update their EPC education every year.

How does an EPC Qualify?

The EPC program is open to business or professional advisors working with established and elder Canadians including: **Financial Advisors, Nurses, Accountants, Occupational Therapists, Lawyers, Funeral Directors, Doctors and Realtors.**

EPC's have completed a comprehensive, self-study and classroom training course featuring the most up-to-date information available on elders and aging issues and a written examination. A faculty of nationally recognized Professionals and Communicators deliver the CIEPS program.