

An “Elder Planning Counselor” adheres to these principles of the CIEPS “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”

Every time you are looking for business and professional advice from someone who really cares about our Elder Canadians.

Check out the CIEPS Web Site for more information on Elder Planning Counselor at

www.elderplanningcounselor.com

When you deal with an EPC you know you are dealing with someone who has your best interests at heart and is committed to excellence.

Canadian Initiative for Elder Planning Studies

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Canada’s Elder population
“Healthy, Wealthy & Wise”



*Your Assurance of
Excellence for
Professionals Serving
Elder Canadians*



Work With People who understand you...the Elder!

Deal With an “Elder Planning Counselor” ... An EPC!

If you are you part of Canada’s largest, growing Population segment, the 50 Plus crowd – The Golden Generation - then you’ll profit by working with an EPC. As an established elder Canadian, you have earned the right to deal with business and professional advisors who are educated in issues important to you.

An Elder Planning Counselor:

- Knows the issues and alternatives that are important and unique to elder life.
- Provides guidance and assistance with the elder’s best interests in mind.

- Accommodates the elder’s physical and health challenges such as illnesses, vision or hearing impairment, when speaking with them.

The ***Canadian Initiative for Elder Planning Studies*** believes that working with established and elder clients requires an overall understanding of all your relevant concerns and involves a “total needs approach.”

These needs evolve from your wage-earning years and continue to change as you become 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 provide money saving practical solutions.

An “EPC’s” 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.

A quote from Mr. Peter Wouters, Faculty Chair “CIEPS”

“Anyone interested in developing a specialty and acumen in the unique needs, wants and issues of today’s and tomorrows elder population will find this a very worthwhile program. We are confident that much of what you will learn you will not have picked up elsewhere, certainly not in a format geared to actionable items and developing deep meaningful relationships with elders, beyond the numbers and figuring out how much is enough.”