

POINTS WORKSHEET

All designation candidates must accrue a minimum of 40 points under the guidelines of the National Institute before a designation may be awarded. This form may be submitted at the time of initial application, or may be forwarded to the National Institute at any point during completion of the program. Please complete all relevant items. (Note: Do not submit this form for review until at least 40 points have been accrued.)

(please print)

Name _____

Designation Program (please check one): Certified Specialist in Estate Planning® (CSEP)
 Certified Specialist in Retirement Planning® (CSRP)

Daytime Phone No. _____

UNDERGRADUATE EDUCATION

College or University attended _____

When attended _____

Degree earned? _____ Type of Degree _____

Number of years attended (minimum of 30 credit hours per year) _____

College or University attended _____

When attended _____

Degree earned? _____ Type of Degree _____

Number of years attended (minimum of 30 credit hours per year) _____

5 POINTS ARE AWARDED FOR EACH YEAR OF UNDERGRADUATE EDUCATION (max. 20 pts.)

TOTAL POINTS EARNED IN THIS SECTION _____

GRADUATE/POST-GRADUATE EDUCATION

Check here if you have earned one or more Master's degrees in a business-related field:

Description of Master's Degree _____ Year Awarded _____

Institution awarding degree _____

Description of Master's Degree _____ Year Awarded _____

Institution awarding degree _____

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Check here if you have earned one or more Ph.D.'s in a business-related field:

Description of Ph.D. _____ Year Awarded _____

Institution awarding Ph.D. _____

Description of Ph.D. _____ Year Awarded _____

Institution awarding Ph.D. _____

Check here if you have earned an LL.M. in Taxation:

Institution awarding LL.M. _____ Year Awarded _____

20 POINTS ARE AWARDED FOR EACH GRADUATE/POST-GRADUATE DEGREE

TOTAL POINTS EARNED IN THIS SECTION _____

LICENSES

Check here if you are a Certified Public Accountant (CPA):

Year of licensing _____ License No. _____

Check here if you are a licensed attorney:

Year of licensing _____ License No. _____

20 POINTS ARE AWARDED FOR EACH OF THE ABOVE LICENSES

TOTAL POINTS EARNED IN THIS SECTION _____

PROFESSIONAL DESIGNATIONS

Please check the appropriate box if you hold any of the following professional designations:

- Certified Financial Planner® (CFP®) Year of designation _____
- Chartered Life Underwriter (CLU) Year of designation _____
- Chartered Financial Consultant (ChFC) Year of designation _____
- Enrolled Agent (EA) Year of designation _____

20 POINTS ARE AWARDED FOR EACH OF THE ABOVE DESIGNATIONS

TOTAL POINTS EARNED IN THIS SECTION _____

TOTAL POINTS _____

Please note: If you have earned at least 40 total points, you may stop here. If not, please fill out the related experience form.