



EZPay Plan

Authorization for Automatic Credit/Debit Card Payments

The Exit Planning Institute's EZPay Plan, allows you to enroll in the Industry's most accredited professional certification training program, **Certified Exit Planning Advisor (CEPA)**.

Accepted by the Certified Financial Planners Board of Standards (CFP®) and the National Association of State Boards of Accountancy (CPA), EZPay Plan includes over 32.5 hours of comprehensive instruction, case studies, group exercises and interactive discussions taught at the Gleacher Center, at the University of Chicago's Booth School of Business, by master facilitators, and by some of the most established leaders in the exit planning industry worldwide.

EZPay Plan allows major credit card holders (only) to make a **onetime payment of \$1,795** to the Exit Planning Institute by bank check or charge, thus registering qualified applicants to the CEPA certification program. The remainder enrollment balance of \$2,500.00 plus interest will be charged on or near the 1st of each month to the applicants authorized credit card below, in twelve (12) monthly installments in the amount of \$215.63 free of prepayment penalties.

EZPay Plan Enrollment Includes:

- CEPA application fee
- CEPA program tuition
- One year Candidate member dues
- The \$10 Trillion Opportunity, co-written by Richard Jackim & Peter Christman
- Private Capital Markets, written by Rob Slee
- CEPA instructional materials
- Continental breakfast, lunches and coffee breaks
- CEPA exam and certification fee

Finance Agreement: I promise to pay to the Exit Planning Institute \$1,795 by bank check or charge on the date of this agreement, and twelve (12) monthly payments of \$215.63 to be charged against my credit card below on or near the 1st of each month until paid in full. **Signature Guarantee:** I hereby warrant to the Exit Planning Institute that only my signature is needed on this authorization to make it effective for my bank or credit card company.

Type of Card: VISA - MasterCard - Discover - American Express

Card Number: _____ Expiration (mm/yy): ____/____ CCV: _____

Name as it appears on card: _____ Phone: (____) _____

Billing Address: _____

Today's Date: _____ Cardholder/Applicant Signature: X _____

Questions concerning EZPay Plan should be directed to the Exit Planning Institute and not your Credit Card Company or bank. Applicants may submit this form with photocopy of credit/debit card and I.D., by **FAX to: (847) 594-6114** or mail: Exit Planning Institute, 2413 W. Algonquin Road, #504, Algonquin, IL 60102.

Total cost of utilizing EZPay Plan through final term including initial payment and financing is \$4,382.50 not including finance charges, bank fees and/or late fees applied by creditors, which may appear on the applicant's credit card statements until paid in full. Dishonored credit card charges will result in a processing fee of \$25.00 payable to the Exit Planning Institute (EPI) and applicants will remain responsible to EPI for the total unpaid balance.