



APPLICATION FOR DESIGNATION AS A
CERTIFIED EDUCATIONAL PLANNER

FINANCES AND PAYMENT

The full fee to you or your institution for becoming a Certified Educational Planner is \$400. It is broken down as follows:

1. \$100 to accompany the application (step one). The application fee is non-refundable. Checks should be made payable to AICEP and sent to:

Commission on Credentialing
American Institute of Certified Educational Planners
P.O. Box 1372
Wexford, PA 15090

2. At the time of your examination, you will be asked to submit a \$100 testing fee.
3. The fee for certification and receipt of your certificate is \$200. You will be asked to submit the certification fee upon the granting of the CEP designation.

Although certification is granted for five years, there is an annual \$75 fee to keep the certificate valid.

Note: Fees indicated on these pages are current as of April 1, 2006. They are subject to change at the discretion of the Commission.

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Commission on Credentialing
P.O. Box 1372
Wexford, PA 15090
info@aicpe.org (e-mail)

Introduction and instructions for application as a CERTIFIED EDUCATIONAL PLANNER

Introduction

The field of educational planning is an exciting and enriching one. Thousands of parents and students rely on consultants and counselors as they are making educational decisions. As such, the future of the professionals who provide educational help to families depends on the ability, experience, honor and character of its practitioners. It is with these thoughts that the certification process was born.

In 1994 a group of professionals set in motion a process that led to a new designation for those engaged in helping students connect with appropriate educational institutions. Established by the Independent Educational Consultants Association, AICEP is now an independent entity with a board made up of persons representing such professions as college admissions, high school college counseling, and educational consulting. It was in the spirit of enhancing professional development, providing appropriate recognition for, and raising public awareness of the expertise of educational consultants and college counselors that the Certified Educational Planner designation was born.

The Certified Educational Planner designation is a mark of distinction demonstrating expanded knowledge and commitment to the fields of college advising and educational consulting.

There are several pages to this application. This is because the designation represents the depth of your experience and knowledge, and because there are many ways to demonstrate excellence and professional commitment.

Applicants for certification must

1. possess a master's degree or higher from an accredited college or university;
2. demonstrate acceptable character, ability and reputation;
3. be employed full- or part-time as an educational option provider (i.e., those working directly with students and families to provide choices of colleges, schools, and other growth/education-oriented alternatives);

4. pledge in writing to adhere to the Principles of Good Practice as presented in these materials.

The credentialing assessment process consists of two parts:

1. Step one is the completion of this application. Points are awarded for Area I (Education) and Area II (Experience, Activities and Leadership). You are also asked to sign both the Affirmation and a Certification of Accuracy, and to supply five reference names. Candidates are notified after Part 1 has been reviewed. Successful candidates will then be ready to move on to the next step.
2. Upon determination that an adequate number of points exist for the continuation of the Certification process, the candidate moves to step two—a written examination covering the areas of institutional and professional knowledge. The goal of the examination is not to exclude, but rather to afford applicants the opportunity to share knowledge; it is designed to be personalized on the basis of different practice venues and services.

The certification process consists of gaining the minimum number of points required in each of the four quantifiable areas. The following presents the maximum earnable and the minimum required for each of the four sections:

Certification depends on points awarded, references, and also on an affirmation of professional standards.

Area	Maximum Earnable	Minimum Required
Education	20	10
Experience, Activities, Leadership.	30	15
Institutional Knowledge	20	10
Professional Knowledge	30	15
TOTAL	100	70*

** While each section could be passed by earning 50% of the maximum score, an overall 70 points is required for awarding of the Certificate.*

The written examination will be offered at various sites across the United States. Upon completing step one, you will be notified of the timing and the locations of the examination.

Submitting an application is not certification. No use of the CEP designation, in any way, is permissible before official designation is granted by the Commission.

The CEP designation is granted for five years. As a CEP, it will be your responsibility to record professional development activities that will lead to your recertification. Recertification procedures and requirements will be distributed to you after you are a CEP. Site visits and continuing education hours/equivalencies are the basis of recertification.

All information in the application will be kept strictly confidential. Please contact the Certification Program office if you have any questions:

Commission on Credentialing
American Institute of Certified Educational Planners
P.O. Box 1372 • Wexford, PA 15090
E-mail: info@aicep.org

Specific instructions

1. Read the entire application before recording information.
2. It is not necessary, nor is it expected, that every applicant will find every section of the application germane to her/his experience and background. If a particular section is not pertinent, indicate by N/A.
3. If extra space is needed, use additional blank sheets. Identify each sheet in the upper right hand corner with your name and number of application item(s) to which the information relates.
4. Be accurate and factual in every reply. Do not skimp on details, but be as concise as possible. Wherever there is a question of accuracy (dates for example) always qualify with “about” or “approximately,” but use these only when necessary. Use alphabetical abbreviations, i.e., NACAC, only after stating the full name first.
5. The last 10 years of professional and personal activities are considered to be most relevant. However, candidates should use their own discretion as to inclusion or non-inclusion of background information.
6. Do not duplicate. If you include information in one place, do not repeat it in another part of the application.
7. The Commission reserves the right to request documentation of any item in the application.
8. As possible, attach a copy of your job description for education-related experiences.
9. Submit a transcript of coursework leading to your highest degree. A copy of the degree itself is also acceptable.
10. Retain a copy of your completed application for your file, and send the original of the application with supporting material along with your application fee (see “Finances and Payment” sheet) to:

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Be sure to include supporting material that is absolutely pertinent to describing your activities. Do not insert pages in individual plastic covers. Please eliminate unnecessary bulk.
11. Recheck all items on the application carefully before signing the form and mailing.

Application for designation as a CERTIFIED EDUCATIONAL PLANNER

Please print or type

Salutation (Dr., Ms., Mr., Mrs., etc.) _____ First name _____

Middle name or initial _____ Last name _____

Other name _____
Maiden name/other name(s) used in transcript and other records

Name as you want it to appear on your certificate. Include degree(s) if desired. _____

Preferred mailing address

Home Business Address _____

City _____ State _____ Zip _____

Country _____ Citizenship _____

Communications (check any that are preferred)

Business phone _____ - _____ Home phone _____ - _____

Fax _____ - _____ E-mail _____

Present position

List full title _____

Brief description of employment/professional responsibilities _____

Optional

Gender Male Female Date of birth _____

Ethnic background (Check one) African-American Caucasian Multiracial Other

Asian-American Hispanic Native American

Payment

Please refer to the sheet titled "Finances and Payment" for information about costs associated with becoming a Certified Educational Planner. The full fee is paid in sequence as you progress through the application process. The application fee is to accompany this application. Checks should be made payable to AICEP.

AREA I. EDUCATION

1. Degree

List all of your degrees below. Please recall that a master's degree is required and that a transcript of your coursework leading to your highest degree (or a copy of the degree itself) should be sent with these materials.

Name of institution _____

City/State _____

Degree _____ Month/year _____

Academic concentration(s) _____

Name of institution _____

City/State _____

Degree _____ Month/year _____

Academic concentration(s) _____

Name of institution _____

City/State _____

Degree _____ Month/year _____

Academic concentration(s) _____

2. Coursework in relevant subjects

List below those courses you have taken to maintain and improve the quality of the professional services that you provide. Coursework must be from an accredited college or university.

A. Work toward a degree beyond those degrees listed above.

Which degree? _____ Number of hours _____ Anticipated date of degree _____

Institution _____

Which degree? _____ Number of hours _____ Anticipated date of degree _____

Institution _____

B. Nondegree/coursework (not necessarily geared toward a degree)

Course _____

Institution/Agency _____

Number of hours _____

Reason for taking _____

Course _____

Institution/Agency _____

Number of hours _____

Reason for taking _____

3. Educational experiences

A. Continuing Education Units (CEU) in relevant fields

Continuing education credits are intended to demonstrate maintenance and improvement of the quality of counseling or consulting services you provide. These may be college programs as well as institutes, seminars, workshops, and conferences. List those continuing education units here in relevant fields. Please send CEU certificates with your application. In general, the most recent CEUs are deemed most relevant.

Title of course _____ Number of hours _____

Sponsor _____ Date _____

Title of course _____ Number of hours _____

Sponsor _____ Date _____

Title of course _____ Number of hours _____

Sponsor _____ Date _____

Title of course _____ Number of hours _____

Sponsor _____ Date _____

Title of course _____ Number of hours _____

Sponsor _____ Date _____

Title of course _____ Number of hours _____

Sponsor _____ Date _____

B. Non-CEU coursework

List non-CEU coursework you have taken that has increased your knowledge about educational options.

Conference/convention/sponsor _____

Title of program _____

Date _____ Number of hours _____

Conference/convention/sponsor _____

Title of program _____

Date _____ Number of hours _____

Conference/convention/sponsor _____

Title of program _____

Date _____ Number of hours _____

Conference/convention/sponsor _____

Title of program _____

Date _____ Number of hours _____

C. Conference attendance

List below those conferences you have attended in the last several years relevant to your certification as an educational planner. Add additional conferences if necessary.

Sponsor _____

Conference or convention _____

Date _____ Number of hours/days _____

Sponsor _____

Conference or convention _____

Date _____ Number of hours/days _____

Sponsor _____

Conference or convention _____

Date _____ Number of hours/days _____

Sponsor _____

Conference or convention _____

Date _____ Number of hours/days _____

Sponsor _____

Conference or convention _____

Date _____ Number of hours/days _____

4. Educational placement training programs

List programs here designed specifically to train you in your current delivery of services to students.

Sponsor _____

Title of program or course _____

Date _____ Number of hours/days _____

Sponsor _____

Title of program or course _____

Date _____ Number of hours/days _____

Sponsor _____

Title of program or course _____

Date _____ Number of hours/days _____

5. Licensure and certification

List all relevant professional licenses, certifications, registrations, or other credentials that you hold.

Please include copies of current licensures or certifications and note when each expires.

Item #1 _____

Item #2 _____

AREA II. EXPERIENCE, ACTIVITIES, LEADERSHIP

6. Individual student educational planning

A. Independent educational consulting experience

Name of business _____

Address (if not given elsewhere) _____

Dates of practice _____

B. School-based educational/college counseling experience

Name of institution _____

Position _____

From _____ to _____ Total number of years _____

Brief description of responsibilities _____

Supervisor's name and title _____

_____ Phone _____ - _____

7. Related paid experiences

Related experiences include those jobs that were/are relevant to your work as an educational planner. These experiences may, for example, be in the fields of education, psychology, or social work.

Name of institution or organization _____

Position _____

From _____ to _____ Total number of years _____

Supervisor's name, title, and phone _____

_____ - _____

Brief description of responsibilities _____

Name of institution or organization _____

Position _____

From _____ to _____ Total number of years _____

Supervisor's name, title, and phone _____

_____ - _____

Brief description of responsibilities _____

8. Organizational consulting

On occasion, counselors or consultants consult with or advise organizations, school systems, government agencies, and so forth. Use this space to describe any such work.

9. Speaking/moderating

List those times where you have been a speaker or moderator on topics pertinent to the field of educational planning. Points are awarded for hours presenting and not for preparation time.

Sponsor _____

Subject _____

Date _____ Number of hours _____ Location _____

Single speaker Panel participant Moderator Repeat session

Sponsor _____

Subject _____

Date _____ Number of hours _____ Location _____

Single speaker Panel participant Moderator Repeat session

10. Honors and awards

Honors or awards received/presented to you during the last 10 years (or earlier if deemed particularly noteworthy). Include achievements through college counseling associations, educational consulting associations, school systems or districts, related professional organizations, and affinity groups. Do not include listings such as Who's Who, certificates of appreciation, and awards for volunteer leadership (unless directly related to educational planning).

Nature of honor received _____

Organization _____ Date _____

Nature of honor received _____

Organization _____ Date _____

11. Writings/publications

List books, chapters, monographs, articles, and similar materials written by you that are relevant to your professional work as an educational planner. Describe each. Attach additional sheets as necessary.

12. Volunteer service

List relevant volunteer leadership roles in community service projects or endeavors. Please do not duplicate information given elsewhere. Attach additional sheets as necessary.

Organization _____

Office or position held or type of service provided _____

Committee name _____

From _____ to _____ Total number of years _____

Organization _____

Office or position held or type of service provided _____

Committee name _____

From _____ to _____ Total number of years _____

13. Leadership in professional educational associations

List below those executive board, board of directors, committee chair or related positions you have held.

Organization _____

Position _____

Dates _____

Organization _____

Position _____

Dates _____

AREA III. REFERENCES

These references should be from people who can attest to your educational counseling or consulting skills, character, and ethical standards. List five present or former supervisors, or professional colleagues in admissions, or Certified Educational Planners with whom you feel comfortable completing the Professional Reference Assessment Form. Do not list relatives or families with whom you have worked.

Name _____
Title _____
Business/institution/other name _____
Address _____
City _____ State _____ Zip _____
Telephone _____ - _____ Fax _____ - _____
Professional relationship _____
Dates of relationship _____

Name _____
Title _____
Business/institution/other name _____
Address _____
City _____ State _____ Zip _____
Telephone _____ - _____ Fax _____ - _____
Professional relationship _____
Dates of relationship _____

Name _____
Title _____
Business/institution/other name _____
Address _____
City _____ State _____ Zip _____
Telephone _____ - _____ Fax _____ - _____
Professional relationship _____
Dates of relationship _____

Name _____

Title _____

Business/institution/other name _____

Address _____

City _____ State _____ Zip _____

Telephone _____ - _____ Fax _____ - _____

Professional relationship _____

Dates of relationship _____

Name _____

Title _____

Business/institution/other name _____

Address _____

City _____ State _____ Zip _____

Telephone _____ - _____ Fax _____ - _____

Professional relationship _____

Dates of relationship _____

AREA IV. INSTITUTIONAL KNOWLEDGE

During the written portion of the credentialing assessment, you will be given the names of three to five colleges or schools from your list below and asked to provide information about them. These colleges/schools/special needs facilities should be ones you feel comfortable writing about as part of your certification. Requested information may include:

- the type of student who might be happy and best served
- admission criteria
- stand out features or attributes of the school
- an example of a similar school
- description of the physical plant
- environment in which the school is located and influences of surrounding communities

In anticipation of that part of the credentialing process, list 25 institutions you visited in recent years.

- | | |
|-----------|-----------|
| 1. _____ | 14. _____ |
| 2. _____ | 15. _____ |
| 3. _____ | 16. _____ |
| 4. _____ | 17. _____ |
| 5. _____ | 18. _____ |
| 6. _____ | 19. _____ |
| 7. _____ | 20. _____ |
| 8. _____ | 21. _____ |
| 9. _____ | 22. _____ |
| 10. _____ | 23. _____ |
| 11. _____ | 24. _____ |
| 12. _____ | 25. _____ |
| 13. _____ | |

AREA V. PROFESSIONAL KNOWLEDGE

Also assessed in step two are skills in analyzing case studies related to your work as an educational option provider. When you take the written portion of the credentialing assessment you will be given three cases covering your field(s) of professional expertise (for example, colleges, schools, or special needs programs). Specifically, after reading a case involving various educational planning issues, you will be asked to describe a plan of action in working with the student, to assess college/school characteristics that would be right for the student, and to provide and rationalize specific institutional recommendations. Cases may also include an assessment of counseling techniques; sensitivity to individual student needs, ethics, confidentiality, and legal issues; and steps in the process of searching for appropriate educational options.

AFFIRMATION OF GOOD STANDING

1. Has a professional license or certification held by you ever been revoked, suspended or voluntarily relinquished?
Yes No
2. Have you ever been placed on probationary status as a disciplinary action by a professional credentialing body?
Yes No
3. Has a professional credentialing body ever rejected your application because of ethical or legal considerations?
Yes No
4. Have you ever been convicted of, or are you now under charges, for any felony, crime, or ethical violation?
Yes No
5. Have you ever had any disciplinary action taken regarding any licenses, certifications, or memberships that you hold?
Yes No
6. Have you ever been prosecuted for, received a judgment for, been convicted of, or pled *no lo contendere* to any felony in any state, territory, or district in the United States or any foreign country?
Yes No
7. Are you now, or have you ever been, addicted to or abusive of, or been treated for addiction to or abuse of, any controlled substance, habit-forming drug, prescribed medications, or alcohol?
Yes No
8. Have you ever entered into any malpractice settlement or had any malpractice judgment entered against you in a court of law?
Yes No

If you have answered “yes” to any statement(s) above, provide a written explanation on a separate sheet. Affirmative responses do not, in any way, automatically deny certification.

Applicant's signature _____

Date _____

CERTIFICATION OF ACCURACY, AGREEMENT, AND RELEASE AUTHORIZATION

I will execute the necessary documents, submit as requested in the Professional and Institutional Knowledge portions of the credentialing process and supply further information as determined by the Commission on Credentialing. I further understand and, by my signature, adhere to the Principles of Good Practice (found on page 18).

I certify that the information provided in this application as submitted to the Commission to be designated as a Certified Educational Planner is accurate and complete to the best of my knowledge and belief. I understand that any intentional or unintentional failure to provide true and complete responses to this application may result in sanctions by the Commission on Credentialing. I understand and agree that I am obligated to report any changes concerning my responses to this application to the Commission on Credentialing in a timely manner and in writing.

I understand that any point system, even those applied fairly and objectively, are subjective and imprecise. I further understand that questions about the points that will be awarded to me will be welcome, but that the Commission's determination of points will be final.

I understand that intentional misrepresentation of the information provided on the application can result in the loss of certification.

I understand and agree that the Commission has the right to contact any person, government agency or entity, or organization to review or confirm any information provided in this application. I further agree to authorize the release of any information requested by the Commission with respect to the review of this application. I further understand and agree that the Commission has the right to notify pertinent credentialing and professional organizations if it is determined that this application contains false information.

I understand that any certificate granted me by the Commission on Credentialing does not in and of itself imply or specify licensure to practice counseling for a fee,

monetary or otherwise. If I am granted certification and practice as an educational planner, I do so at my own risk.

I hereby release the Commission on Credentialing and the American Institute of Certified Educational Planners from any and all liability and/or claims that may arise from any decision to practice as an educational consultant, a school-based college counselor or related professional titles.

I understand that certification depends upon my fulfillment of all required criteria for certification, including application of the Principles of Good Practice.

I understand that all material becomes the property of the Commission upon receipt and that neither originals nor photocopies will be returned to me.

I understand and agree that this certification and recertification depends upon my fulfillment of all required criteria and obligations. I further agree to fully inform the Commission, in a timely manner, if I become the subject of any ethics, disciplinary, criminal, or lesser offenses, complaints, or charges. If my practice changes in any substantive manner, I agree to inform the Commission.

In the event that my certification is suspended or revoked, I agree to comply with all directives or orders of the Commission on Credentialing and the American Institute of Certified Educational Planners, including the return of certification documents. I agree to comply with such directives and orders in a timely manner and at my own expense.

Applicant's signature _____

Print name _____

Date _____

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PRINCIPLES OF GOOD PRACTICE

Introduction

These principles are designed to promote and maintain the highest standards of professional service and personal conduct among its practitioners. Attestation to the Principles is required for certification.

The planner's primary obligation is to represent each client accurately based upon a professional evaluation of the circumstances and requirements of the case.

I. Competence

- A. An educational planner strives to be aware of and practice within the boundaries of his/her competence based on relevant education, training, and/or experience. Relevant education refers to psychology, educational counseling, child development, and other associated courses. Training can include apprenticeship to, mentoring by, and/or supervision by an experienced consultant or counselor. Experience may include admissions, counseling, placement, or administrative positions in schools, colleges, or other educational settings.
- B. A planner strives to be aware when a case is partly or entirely outside the scope of his/her knowledge or expertise, and may seek—respectively—to consult with or refer to colleagues possessing specialized knowledge or expertise.
- C. A planner strives continually to update his/her knowledge of educational options across the broad range of schools, colleges, and/or programs pertinent to his/her practice through site visits and other appropriate means of gathering information.
- D. A planner strives to present him/herself as able to deal only with those areas in which he/she has competence.
- E. A planner strives to know and adhere to federal and state laws relevant to educational counseling, consulting, and planning.

II. Multiple relationships with potential conflicts of interest

- A. A planner strives to avoid multiple relationships with his/her client and/or his/her client's family that could reasonably and foreseeably give rise to actual or perceived conflict(s) of interest, interfere with the ability of the counselor or consultant to provide objective services, or embarrass the client or the family.
- B. To avoid potential misunderstandings, a planner who has another role—such as being an owner, part-owner, board member of, employee of, consultant to, or trainer for a college, school, or other program—shall provide to clients a written disclosure describing this additional relationship. The planner should include with this disclosure a consent form for the client and family to sign, indicating that they have been informed of this additional role, have discussed it with the planner, and agree to proceed with the services.
- C. If a planner has provided or plans to provide services to the client and/or the client's family as a member of another licensed profession or professional organization, the counselor or consultant shall follow the principles and practices of that other profession or professional organization, such as those specified by statute, regulation, or the ethical code of that other profession or professional organization—including any limitations on potentially conflicting multiple relations.

III. Relationship with the student and family

- A. Although the child and his/her own best education and developmental interests are the main focus of our work, the parents, stepparent(s), or guardian(s) who may participate in the process in person or by phone, are to be valued as important contributors.
- B. The educational consultant has an obligation to discuss with the parent(s) or guardian(s), as early as feasible, the fees and financial arrangement. The planner may include the child when discussing the

nature and scope of these services and the limits of confidentiality. The planner respects the integrity of the consulting relationship.

- C. The primary focus of the consultant or counselor in most instances is to discern and recommend options that will serve the best interests of the child. This most appropriately includes some meeting or communication with one or both parent(s) or guardian(s) to get the views of the child's needs and the resources currently available. Similarly, consultation with selected schools, other planners, and other professionals may be necessary or desirable.
- D. The consultant or counselor must clarify that his/her service does not guarantee that a placement will be made. This preserves the possibility of recommending that the child remain in the same educational situation or participate in an alternative work or study experience as part of an educational plan, at least for the time being.
- E. The planner strives to interact with students in ways that are respectful, recognize their dignity, and show sensitivity to their special strengths, values, and needs.
- F. The planner strives to provide substantially the same information appropriate to each participating parent(s), guardian(s), child, or others involved, such as other professionals.
- G. The planner strives to be aware of cultural, individual, and role differences. Differences may arise from such factors as age, race, gender, language, religion, ethnicity, sexual orientation, disability, national origin, and socioeconomic status. The planner tries to eliminate the effects on his/her work of biases based on these factors and does not knowingly participate in or condone unfair discriminating practices.

IV. Relationships with schools, colleges, or other programs

- A. The counselor or consultant neither solicits nor accepts compensation from any school, college, institution, or special program for placement of a child. In addition, the planner strives to avoid actions that could give parents, schools, colleges, special programs, colleagues, or other professionals even the appearance of soliciting or accepting such compensation.
- B. The planner strives to understand the philosophies, values, missions, goals, approaches, and methods of schools, colleges, and other institutions and programs from which he/she draws his/her recommended options. In addition, the counselor or consultant strives to avoid actions that could give schools, colleges, institutions, or special programs even the appearance of applying undue influence on their decisions regarding admission or other dealings with his/her students.
- C. The planner does not write for the student any biographical or other essays required in application materials, although the planner may have a coaching role, such as discussing with the student some desirable elements to include or some ways of coping with written or interview questions about past or current learning or other difficulties.
- D. The consultant or counselor strives to maintain awareness of current practices and trends in those types of educational settings pertinent to the services he/she offers.
- E. The counselor or consultant strives to build positive professional relationships with admissions officers and other educators at the schools, colleges, institutions, and special programs pertinent to the services he/she offers.

V. Relationships with other professionals

The planner strives to cooperate in reasonable and appropriate ways with other counselors/consultants and work with them in the enhancement of one another's practices and in the advancement of educational planning. Sharing information has become a tradition of consultants and counselors. Planners do not ask for payment when they serve as resources to each other.

VI. Advertising and other public statements

- A. In advertising and other public statements, the planner strives to avoid making statements that are false, deceptive, misleading, or fraudulent, either through what they state, convey, or suggest, or what they omit about the consultant or counselor's professional practice and activities, or those of individuals or organizations with which he/she is affiliated. The responsibility to strive to be accurate and to avoid false or deceptive statements applies, for example, to the consultant's training, experience and competence; degrees and credentials; association and affiliations; services; and fees. A planner may claim special abilities only if they are demonstrable.
- B. Through paid or unpaid public statements or announcements in meetings, the media, or any other form of advertising, the planner may use appropriate opportunities to increase public awareness and understanding of the profession of educational planning and his/her own spectrum of expertise and services.

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