

# ESTATE PLANNING COUNCIL OF NORTH TEXAS

P. O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020  
E-Mail [northtexasepc@yahoo.com](mailto:northtexasepc@yahoo.com) Website: [www.epcnt.org](http://www.epcnt.org)

## 2019-2020 INDIVIDUAL MEMBERSHIP ENROLLMENT FORM (June 1, 2019-May 31, 2020 – Dues are Non-Transferable and Not Pro-Rated)

Membership shall consist of the following professionals who are actively involved or interested in the estate planning process: officers of trust companies or banks maintaining trust departments which are actively engaged in trust or estate operations and administration; licensed life underwriters; attorneys at law; certified public accountants; financial planners; business valuation specialists; and other professionals actively involved in the estate planning process.

Name \_\_\_\_\_

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_ (Please Print Clearly)

NOTE: Email required for communication purposes

### **What is your CURRENT WORKING Discipline? (CHOOSE ONE)**

\_\_\_\_ Attorney Bar Card Number \_\_\_\_\_ Business Valuation Specialist

\_\_\_\_ CPA \_\_\_\_ Financial Planner (**must be CFP**) \_\_\_\_ Licensed Life Underwriter (**CLU or CHFC**)

\_\_\_\_ Trust Officer \_\_\_\_ Other Profession – Designated Profession: \_\_\_\_\_

### **Designations**

\_\_\_\_ AEP \_\_\_\_ CFP \_\_\_\_ CHFC \_\_\_\_ CLU \_\_\_\_ CPA \_\_\_\_ CTFA \_\_\_\_ JD \_\_\_\_ CAP

Years of Experience in **CURRENT** Discipline: \_\_ less than 5 \_\_ 5-10 \_\_ 10-20 \_\_ 20+

**Annual Dues (Required)**  
(meals not included in dues)

**\$ 75.00**

Please make your check payable to “**Estate Planning Council of North Texas**” and mail check with this application to: **Estate Planning Council of North Texas, P.O. Box 38553, Dallas, TX 75238.**

To pay by credit card on the website: complete membership form, scan and email to [northtexasepc@yahoo.com](mailto:northtexasepc@yahoo.com). Payment can then be submitted under “**Member Renewal**” on the website.

**Note: We ask that members and non-members refrain from using the member directory or the website directory to send any solicitations in any form.**