

ESTATE PLANNING COUNCIL OF NORTH TEXAS

P. O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020
E-Mail northtexasepc@yahoo.com Website: www.epcnt.org

2020-2021 INDIVIDUAL MEMBERSHIP ENROLLMENT FORM (June 1, 2020-May 31, 2021 – 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+

Please Check All that Apply:

Annual Dues (Required) _____ \$ 75

(meals not included in dues)

Prepaid Meal Option Not Available for 2020-2021

Printed Directory _____ \$ 15

(**Deadline** for member name in PRINTED directory is **September 1**)

(PRINTED Directory **NOT AVAILABLE** for purchase **after September 1**)

Sponsor of a Meeting (does not include dues) _____ \$500

Website Link (for sponsor): _____

(for info on sponsorship, go to www.epcnt.org, click on "about us", scroll down page)

TOTAL ENCLOSED \$ _____

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.

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.