

# 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)

## 2022-2023 INDIVIDUAL MEMBERSHIP ENROLLMENT FORM (June 1, 2022-May 31, 2023 – Dues are Non-Transferable and Not Pro-Rated)

**FOR NEW MEMBERS:** To pay by credit card, please submit the completed printed membership form via email to [northtexasepc@yahoo.com](mailto:northtexasepc@yahoo.com) and then go to the website, click on the drop-down menu "membership" and then "member renewal".

Name \_\_\_\_\_

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

Firm 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

(program cost/meals not included in dues)

(Printable membership directory will now be available on the website after September 19; contact [northtexasepc@yahoo.com](mailto:northtexasepc@yahoo.com) for details)

**Sponsor a Meeting (Optional)** does not include dues) \_\_\_\_\_ \$500

**Membership required to sponsor a meeting**

Website Link (for sponsor): \_\_\_\_\_

(for info on sponsorship, go to [www.epcnt.org](http://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 (or pay by credit card online after submitting form to [northtexasepc@yahoo.com](mailto:northtexasepc@yahoo.com) – see above instructions)

**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.**

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.