

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

2024-2025 **INDIVIDUAL** MEMBERSHIP ENROLLMENT FORM (June 1, 2024-May 31, 2025 – 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. **WAIT FOR APPROVAL** 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+

New Member: I was referred by _____

Please Check All that Apply:

Annual Dues (Required) _____ \$ 75
(program cost/meal not included in dues)

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

Membership required to sponsor a meeting-see website

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 (**PREFERRED PAYMENT:** pay by credit card online after submitting form to northtexasepc@yahoo.com – see above instructions)

Note: We ask that members and non-members refrain from using 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.