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

2025-2026 INDIVIDUAL MEMBERSHIP ENROLLMENT FORM

(June 1, 2025-May 31, 2026 – Dues are Non-Transferable and Not Pro-Rated)

NEW MEMBERS: To pay by credit card (PREFERRED PAYMENT), 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 address is required for communication purposes
New Member: I was referred by ___________________________________

Discipline you CURRENTLY PRACTICE:
(CHOOSE ONLY ONE DISCIPLINE)

☐ **Attorney**
☐ **Business Valuation Specialist**
☐ **Certified Public Accountant**
☐ **Financial Planner (CFP)**
☐ **Life Insurance (CLU or ChFC)**
☐ **Trust Management**
☐ **Associated Professionals**

Designations (check all that apply):

☐ **AEP**
☐ **CAP**
☐ **CFP**
☐ **ChFC**
☐ **CLU**
☐ **CTFA**
☐ **CPA**
☐ **JD**

Experience in CURRENT discipline:

☐ **Less than 5 years**
☐ **5-10 years**
☐ **10-20 years**
☐ **20 + years**

Check all that apply:

☐ **$100 Annual Dues (REQUIRED) [DOES NOT Include Program/Meal Cost for Meetings)**
☐ **$500 Sponsorship Fee (OPTIONAL) Membership Required/Must be Approved for Sponsorship**
(for info on sponsorship, go to www.epcnt.org, click on "about us", scroll down page)
Website link (for Sponsorship): __________________________

________ **TOTAL ENCLOSED**

To mail: Please complete this enrollment form, include your check for the appropriate amount and mail to the 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 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.