



San Joaquin Estate Planning Council  
**Application for Membership**

1. \_\_\_\_\_  
 First Name Initial Last Name

2. Firm Name (if applicable) \_\_\_\_\_

3. Office address: \_\_\_\_\_  
 \_\_\_\_\_

Phone number: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ Cell number: ( ) \_\_\_\_\_

Email work: \_\_\_\_\_ Email Personal: \_\_\_\_\_

4. Check the space that applies to you: **(X)**

Trust Officer____	Chartered Financial Consultants or Certified Financial Planner ____	Accredited Valuation Expert____
Attorney____	Chartered Financial Analyst____	Private Fiduciary____
CPA ____	Educator____	Other Professional (Determined by the Board to be relevant to the Field of Estate Planning) ____
Chartered Life Underwriter____	Planned Giving Professionals____	

5. State the nature and scope of your activities in the estate planning field:

\_\_\_\_\_

6. If you have held membership in an Estate Planning Council previously, please state where and the period or years of membership: \_\_\_\_\_

7. Give the name, address and phone number of 2 references (from the categories listed in Question #4)

		( ) _____
Name	Address	Phone
		( ) _____
Name	Address	Phone

8. Obtain the signatures of two members that will sponsor you:

Sponsor	Sponsor

9. \_\_\_\_\_  
 Signature of Applicant Date

## San Joaquin Estate Planning Council

The objective of the San Joaquin Estate Planning Council is to further the growth and scope of the estate planning services its members can render to the public by intelligent cooperation and understanding the relationship each professional bears to the others and to the others and to their clients.

Membership is open to professionals who shall have practiced in their profession and are able to demonstrate that their practice is active in the estate planning field. Application is made in writing through the invitation of 2 member sponsors who attest to the qualification of the applicant.

Annual dues are \$325.00, to be submitted once the application for membership has been approved by the board. (Those that enter after the first meeting can prorate the check for their dues at \$50.00 times the number of meetings remaining in the year). The annual dues provide for the expenses of the council, including the cost of dinners for members.

Members may feel free to invite colleagues and/or associates as their guests to meetings; however, there is a \$30.00 per person guest charge. The name(s) of the guest(s) should be submitted to the secretary prior to the meeting and the check be paid at the check in table.

*Please note: member's dining privileges are nontransferable (i.e. no member can send a guest to dine "in his/her place" – all non-members must pay the guest charge).*