



NATIONAL ASSOCIATION OF ESTATE PLANNERS AND COUNCILS

MEMBERSHIP APPLICATION

The National Association of Estate Planners & Councils requires its affiliated councils to admit to membership attorneys, certified public accountants, chartered life underwriters, certified financial planners and trust officers. In addition, many councils admit professionals from other disciplines. NAEPC fosters a team-approach to estate planning involving cross-professional disciplines to better serve the public's need in estate planning.

Complete the application, return necessary documents and return with a check payable to the NAEPC.
Mail to:
National Association of Estate Planners & Councils
1120 Chester Ave., Ste. 470
Cleveland, OH 44114-3514

NAEPC dues are invoiced and payable on January 1 of each calendar year. Councils joining on or after October 1st of any calendar year will not be assessed dues the year immediately following their initial join date.

Councils with up to 100 members.....\$125/yr
Councils with more than 101 - 250 members.....\$300/yr
Councils with 251 or more members.....\$400/yr

Council Name: _____
Council Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____ E-Mail: _____
Date organization began: _____ Current Membership #: _____ Fiscal Year Calendar Year
Contact Name: _____ Contact Person Position Held: _____

Do you have an existing website? Yes No If yes, what is the address? _____
Are you interested in a website hosted by the NAEPC? Yes No

Which disciplines are currently admitted for membership in your organization?
 CLU® ChFC® CTFA Atty CPA CFP®
Other(s) (list or attach separate sheet): _____

Include the following with your remittance:
 A current list of officers & directors (contact information included, this list will be used internally to communicate with the leadership of your EPC)
 A current copy of the ByLaws of the organization (will be kept on file)
 Appropriate payment

Please email the following to eleanor@naepc.org with "New Council Roster – [insert council name]" in subject line:
 An **Excel** file of your entire member roster with the following individual fields: last name, middle initial, first name, professional designations, firm name, address 1, address 2, city, state, zip and e-mail address. By providing this list, NAEPC agrees to adhere to internal guidelines surrounding the use of your council's membership roster (see here: http://www.naepc.org/assets/national/pdf/council_every_council.pdf).

VERIFICATION

I verify that all of the information I have provided in this application is true and correct.

Signature

Date