



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 with < 40 members.....	\$100/yr
Councils with 41 - 100 members.....	\$150/yr
Councils with 101 - 250 members.....	\$325/yr
Councils with 251- 400 members.....	\$450/yr
Councils with 401+ members.....	\$500/yr

Council Name: _____

Council Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ E-Mail: _____

Date organization began: _____ Current Membership #: _____ Fiscal Year ending _____ Calendar Year

Contact Name: _____ Contact Person Position Held: _____

**In an effort to expedite the application process, please answer the following questions
and provide the requested information in your remittance.
Thank you!**

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): _____

- Include the following with your remittance:
- A current list of officers & directors (contact information included)
 - A current copy of the Bylaws of the organization
 - Appropriate payment

Email spreadsheet of members to **councilservices@naepc.org**

- 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.
“New Council Roster – [insert council name]” in subject line

VERIFICATION

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

Signature

Date