

NEW MEMBERSHIP APPLICATION 2024-2025
THE ESTATE PLANNING COUNCIL OF NORTHEAST FLORIDA

There are three types of membership categories of the estate planning council. The Standard Member includes traditional disciplines: Certified Trust and Financial Advisors, Officers of Trust Companies, and Officers of Bank Trust Departments; CLUs, CFCs and CFPs, members of the Florida Bar, and Certified Public Accountants, all of whom must be interested in and actively practicing estate planning in Northeast Florida. Dues for 2024-2025 year are \$500 for members, discounted to \$475 *if paid prior to September 30, 2024.*

The second category is Junior Member which may be granted by the Executive Committee to individuals who are candidates on track to qualify for certification under one of the membership disciplines. Dues are the same as for Standard Members.

A separate category is for Associates: "Other persons whose business or profession is related to estate planning and who may become members by approval of the Executive Committee." Dues for 2024-2025 are \$590 for Associate members, discounted to \$565 if paid prior to September 30, 2024. **Associate Membership requires a separate application and is available upon request.*

(Name of New Member)

(Bus. Phone)

(Firm name)

(Mobile Phone)

(Street address or post office box)

(Fax)

(City, state and zip code)

(E-mail)

Check one box as to applicable membership classification (do not add or alter):

- Attorney-at-Law
- Certified Public Accountant (CPA)
- Chartered Life Underwriter (CLU)
- Chartered Financial Consultant (ChFC)
- Certified Financial Planner (CFP)
- Trust Officer/Certified Trust & Fiduciary Advisor (CTFA)
- Junior Member

Applicant's signature

Date

Membership information form must be accompanied by a business card and check payable to:

EPC of NE Florida, 187 SE Stiles Way, Lake City, Fl 32025.

OR you can pay with a credit card by going to the Member Renewal link on our web page: www.nefepc.org

Email photo to: nefepc@gmail.com (If you have any questions please call Cherri at 904-626-6282)

Sponsor signature

Print Name

Date

Application Accepted by _____

Secretary and Membership Chairman

Date