SACRAMENTO ESTATE PLANNING COUNCIL

APPLICATION FOR MEMBERSHIP

(IMPORTANT: Read page 2 carefully before completing application)

Name: ____

First Initial Last

Firm Name: ____

Firm Address: ____

Phone: __________________________ Email: ____

Classification:____

(see classifications on page 2)

Give a brief description of your estate planning activities during the past two years:

Give academic and professional degrees and school attended:

Give professional organizations you belong to:

Have you held membership in an Estate Planning Council previously? Yes___________ No__________
If yes, give detail of place, date and office held on back of application.

*References: (1)__________________________________/ ______________________________________

Signature Print Name and classification

(2)____/ ______________________________________

Signature Print Name and classification

*Sponsor: __________________________________/ ______________________________________

Signature Print Name and classification

***Both references and the sponsor must be current members of the Sacramento Estate Planning Council. Only one of the three may be from the applicant's profession. Sponsoring member certifies that applicant has attended two meetings within the past year.**

TWO MEETINGS ATTENDED **(must have attended within 1 year of applying):** ______________________________

____________________________________ ____________________________

Signature of Applicant Date

For Membership Committee:

Date Received________________
Committee Action_____________
Fees Received________________
Board Approval_______________

MAIL or EMAIL COMPLETED FORM TO:

Raquel Altavilla
SEPC
PO Box 19942 · Sacramento, CA 95819
Phone: 916.715.5939 Email: admin@sacepc.org

SACRAMENTO ESTATE PLANNING COUNCIL
APPLICATION FOR MEMBERSHIP

Objectives of the Council

- To provide a forum where estate planning professionals in the Sacramento Valley area may exchange views and become better acquainted with each other and their work;

- To encourage better understanding and cooperation among professional individuals who participate in any of the various phases of estate planning; and

- Generally, to promote the best interest of members of the Council and those of the general public through helpful service in matters of estate planning.

Qualifications for Membership

- Applicant must be actively practicing in the area of **estate planning** within one of the following designated classifications:

  1. Accredited Valuation Experts (Who are members of: The American Institute of Certified Public Accountants (AICPA), The American Society of Appraisers (ASA), The Institute of Business Appraisers (IBA), The National Association of Certified Valuation Analysts (NACVA), or a comparable accrediting organization.
  2. Attorneys
  3. Certified Public Accountants
  4. CFP/ChFCs
  5. Chartered Financial Analysts
  6. Chartered Life Underwriters
  7. Educators
  8. Planned Giving Professionals
  9. Officer Representatives of Trust Companies
  10. Private Fiduciaries

- Applicant must be recommended by three professional Estate Planners (two references and a sponsor). These three must all be current members of the Council, **and only one of the three can be from the applicant's profession.**

- Membership period runs July 1 through June 30. For those applying from July through December of the current membership period, the membership dues of $325 must be remitted with the completed application. For those applying from January through June of the current membership period, membership dues of $162.50 must be remitted with the completed application. In either case, these dues will cover membership through the balance of the membership period ending June 30. Payment will be refunded if applicant is not accepted for any reason.

- **Applicant must attend two general membership meetings prior to consideration of the application by the Board of Directors**. The SEPC Estate Planning Forum counts as a meeting for this purpose. The Annual meeting and Holiday party do not qualify. The sponsor must certify in writing that the applicant qualifies for membership.

- After applicant's membership has been approved, Applicant may be asked to provide a short Tax and Legislation update to the Council at one of the monthly dinner meetings. Participation by new members is highly encouraged.