SACRAMENTO ESTATE PLANNING COUNCIL <u>APPLICATION FOR MEMBERSHIP</u> (IMPORTANT: Read page 2 carefully before completing application)

Name:			
	First	Initial	Last
Firm Name:			
Firm Address:			
Phone:	Eı	mail:	
Classification:	(see	1	
	(see	classifications on	page 2)
Give a brief descripti	on of your estate planning	ng activities durin	g the past two years:
Give academic and p	rofessional degrees and s	school attended:	
Give professional org	ganizations you belong to):	
	pership in an Estate Planr place, date and office hel		viously? YesNo
*References: (1)	Signature		Print Name and classification
	Signature		Print Name and classification
(2)		/	
(2)	Signature		Print Name and classification
*Sponsor:		/	
<u></u>	Signature	· · · · · · · · · · · · · · · · · · ·	Print Name and classification
the three may be from meetings within the pa	the applicant's professio ast year.	n. Sponsoring me	ne Sacramento Estate Planning Council. Only one cember certifies that applicant has attended two r of applying):
Signature of Applica	nt	Date	
For Membership Cor	nmittee:	MAIL	or EMAIL COMPLETED FORM TO:
Date Received		Raquel	Altavilla
Committee Action		SEPC	
Fees Received			x 19942 · Sacramento, CA 95819
Board Approval		Phone:	916.715.5939 Email: admin@sacepc.org

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Objectives of the Council

	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.				
Qual	lifications for Me	<u>mbership</u>			
	Applicant must classifications:	be actively practicing in the area of estate planning within one of the following designated			
	1.	Accredited Valuation Experts			
		Attorneys			
		Certified Public Accountants CFP/ChFCs			
		Chartered Financial Analysts			
		Chartered Life Underwriters			
		Educators			
		Planned Giving Professionals			
		Officer Representatives of Trust Companies Private Fiduciaries			
		be recommended by three professional Estate Planners (two references and a sponsor). st all be current members of the Council, and only one of the three can be from the fession.			
	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.				

Revised 7/17/2024 Page 2