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:		Email:		
Classification:			page 2)	
		(see classifications on	page 2)	
Give a brief description	on of your estate p	olanning activities during	g the past two years:	
Give academic and pro	ofessional degree	s and school attended:		
Give professional orga	anizations you be	long to:		
		e Planning Council previous held on back of appl	iously? YesNo	
*References: (1)		/		
\ \ \ \ <u> </u>	Signature	;	Print Name and classification	
(2)			Print Name and classification	
	Signature		Print Name and classification	
*Sponsor:		/	Print Name and classification	
	Signature		Print Name and classification	
	the applicant's pr		e Sacramento Estate Planning Council. Only one o mber certifies that applicant has attended two	
TWO MEETINGS ATT	ENDED (must ha	ve attended within 1 year	of applying):	
Signature of Applican	ıt	Date		
For Membership Com	<u>ımittee</u> :	MAIL c	or EMAIL COMPLETED FORM TO:	
Date Received			Raquel Altavilla	
Committee Action		SEPC		
Fees Received			treet, #C342	
Board Approval			ento, CA 95814 916.715.5939 Email: raltavilla@comcast.net	

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.			
Qualij	fications for Membership			
	Applicant must be actively practicing in the area of estate planning within one of the following designated classifications:			
	 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 			
	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 \$225 must be remitted with the completed application. For those applying from January through June of the current membership period, membership dues of \$112.50 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 Technical 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.			
	Under no circumstances may an applicant from one of the designated classifications be accepted for membership if such acceptance would result in that classification constituting more than 40% of the total Council membership.			

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