

Member Categories

Professionals in the following fields are eligible to join, provided the criteria in our enlistment guidelines are fulfilled.

- Officer Representatives of Trust Companies
- Attorneys
- Certified Public Accountants
- Chartered Life Underwriters
- Chartered Financial Consultants or Certified Financial Planners
- Chartered Financial Analysts
- Educators
- Planned Giving Professionals
- Accredited Valuation Experts
- Private Fiduciaries