

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
 915 L Street, #C342
 Sacramento, CA 95814
 Phone: 916.715.5939 Email: admin@sacepc.org

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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
 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 \$255 must be remitted with the completed application. For those applying from January through June of the current membership period, membership dues of \$127.50 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.