

# DALLAS ESTATE PLANNING COUNCIL

P.O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020  
E-Mail: [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) Website: [www.dallasepc.org](http://www.dallasepc.org)

## 2018-2019 MEMBERSHIP ENROLLMENT FORM

(June 1, 2018-May 31, 2019 – *Dues are Non-Transferable and Not Pro-Rated*)

Name \_\_\_\_\_

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_ *(please print clearly)*

NOTE: Email addresses are required for communication purposes

Discipline you **CURRENTLY PRACTICE:**  
**(CHOOSE ONLY ONE)**

Designations *(check all that apply):*

\_\_\_ Attorney Bar Card No. \_\_\_\_\_

\_\_\_ JD

\_\_\_ AEP

\_\_\_ Certified Public Accountant

\_\_\_ CPA

\_\_\_ CAP

\_\_\_ Financial Planner (check CFP or ChFC)

**(MUST be CFP or ChFC)**

\_\_\_ CFP

\_\_\_ ChFC

\_\_\_ Life Insurance (check CLU or AALU)

\_\_\_ CLU

\_\_\_ AALU Member

**(MUST be Chartered Life Underwriter or AALU member)**

\_\_\_ Trust Management

\_\_\_ CTFA

\_\_\_ Associated Professionals: Designation: \_\_\_\_\_

Years of Experience in **CURRENT** discipline: \_\_\_ Less than 5 \_\_\_ 5-10 \_\_\_ 10-20 \_\_\_ 20+

Check all that apply:

Annual Dues (**REQUIRED**) [*Does not include meals*] \_\_\_\_\_ \$ 95

**TOTAL ENCLOSED** \$ \_\_\_\_\_

Please complete this enrollment form, include your check for the appropriate amount and mail to the Dallas Estate Planning Council, P. O. Box 38553, Dallas, TX 75238.

For more info on Patron Fee, go to [www.dallasepc.org](http://www.dallasepc.org), click on "About Us", scroll to "Patron".

If your organization is interested in sponsoring a meeting or social event please go to [www.dallasepc.org](http://www.dallasepc.org), click on "About Us", scroll down to "Sponsor" and read the sponsor information. Please contact Teresa Moore, Executive Director, 214-340-8020 or [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) if you would like to sponsor.

Financial assistance for dues is available on a case by case basis. Please contact Teresa, [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com)

*\*Note: We ask that members and non-members refrain from using the member directory or the website directory to distribute any solicitations in any form.*