

DALLAS ESTATE PLANNING COUNCIL

P.O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020
E-Mail: dallasepc@yahoo.com Website: www.dallasepc.org

2020-2021 MEMBERSHIP ENROLLMENT FORM

(June 1, 2020-May 31, 2021 – *Dues are Non-Transferable and Not Pro-Rated*)

Name _____

Firm Name _____

Address _____

City _____ State _____ Zip _____ Phone _____

E-mail _____ *(please print clearly)*

NOTE: Email address is required for communication purposes

NEW MEMBER: I was referred by _____

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

___ Attorney Bar Card No. _____

___ Certified Public Accountant

___ Financial Planner (check CFP or ChFC)

(MUST be CFP or ChFC)

___ Life Insurance (check CLU or AALU)

(MUST be Chartered Life Underwriter or AALU member)

___ Trust Management

___ Associated Professionals: Designation: _____

Designations *(check all that apply):*

___ JD ___ AEP

___ CPA ___ CAP

___ CFP ___ ChFC

___ CLU ___ AALU Member

___ CTFA

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

Check all that apply:

Annual Dues (**REQUIRED**) [no meals]

___ \$ 95

Prepaid Meal Option is not Available for 2020-2021

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, 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, 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 if you would like to sponsor.

Financial assistance for dues is available on a case by case basis. Please contact Teresa, dallasepc@yahoo.com

NAEPC: To receive additional email communications from NAEPC (2-3 webinars, 4-6 conference, 1 per quarter Journal, plus NAEPC news) opt-in: http://www.naepc.org/about/contact/mailling_list