

# DALLAS ESTATE PLANNING COUNCIL

P.O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020  
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## 2021-2022 MEMBERSHIP ENROLLMENT FORM

(June 1, 2021-May 31, 2022 – Dues are Non-Transferable and Not Pro-Rated)

Name \_\_\_\_\_

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

Firm 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)**

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**) [NO MEETING MEALS]

\$ 95

**Prepaid Meal Option is not Available for 2021-2022**

**TOTAL ENCLOSED**

\$ \_\_\_\_\_

Please complete this enrollment form, include your check (or pay by credit card online after submitting form to [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com)) 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)

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](http://www.naepc.org/about/contact/mailling_list)