

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

2024-2025 INDIVIDUAL MEMBERSHIP ENROLLMENT FORM
(June 1, 2024-May 31, 2025 – Dues are Non-Transferable and Not Pro-Rated)

Membership consists of the following professionals who are ACTIVELY INVOLVED IN THE ESTATE PLANNING PROCESS: attorneys at law; certified public accountants; financial planners; officers of trust companies or banks maintaining trust departments which are actively engaged in trust or estate operations and administration; and other associated professionals actively involved in the estate planning process.

FOR NEW MEMBERS: To pay by credit card, please submit the completed printed membership form via email to dallasepc@yahoo.com. **WAIT FOR APPROVAL BEFORE PAYMENT** and then go to the website, click on the drop-down menu "membership" and then "member renewal".

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 DISCIPLINE)

Designations *(check all that apply):*

___ Attorney Bar Card No. _____

___ JD ___ AEP

___ Certified Public Accountant

___ CPA ___ CAP

___ Financial Planner

(MUST be CFP or ChFC)

___ CFP ___ ChFC

___ Life Insurance

___ CLU ___ Finseca Member

(MUST be CLU or Finseca 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) _____ \$ 95
[DOES NOT INCLUDE PROGRAM/MEAL COST FOR MEETINGS]

Patron Fee (OPTIONAL) _____ \$350

For more info on Patron Fee, go to www.dallasepc.org, click on "About Us", scroll to "Patron".

(includes link -does not include dues – membership dues required for patron)

Website link (for Patron): _____

TOTAL ENCLOSED \$ _____

Please complete this enrollment form, include your check (**PREFERRED PAYMENT:** pay by credit card online after submitting form to dallasepc@yahoo.com) for the appropriate amount and mail to the Dallas Estate Planning Council, P. O. Box 38553, Dallas, TX 75238.

SPONSOR A MEETING: If your organization is interested in sponsoring a meeting, 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, dallasepc@yahoo.com if you would like to sponsor.

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