

**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)

**2025-2026 **INDIVIDUAL** MEMBERSHIP ENROLLMENT FORM**

*(June 1, 2025-May 31, 2026 – Dues are Non-Transferable and Not Pro-Rated for Members)*

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](mailto: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)**

- Attorney
- Certified Public Accountant
- Financial Planner (CFP or ChFC)
- Life Insurance (CLU or Finesca member)
- Trust Management
- Associated Professionals

**Designations (check all that apply):**

- AEP
- CAP
- CFP
- ChFC
- CLU
- CTFA
- CPA
- Finesca Member
- JD

**Experience in CURRENT discipline:**

- Less than 5 years
- 5-10 years
- 10-20 years
- 20 + years

**Check all that apply:**

- \$125 Annual Dues (**REQUIRED**) [DOES NOT INCLUDE PROGRAM/MEAL COST FOR MEETINGS]
- \$350 Patron Fee (OPTIONAL)

For more info on Patron Fee, go to [www.dallasepc.org](http://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

To mail: 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.