

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

2026-2027 **INDIVIDUAL MEMBERSHIP ENROLLMENT FORM**
(June 1, 2026-May 31, 2027 – *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. **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, 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.