

Estate Planning Council of Montgomery County, Maryland, Inc.

2026 - 2027 Membership Application

Name _____ Firm Name _____

Title _____

Address _____

Business Telephone _____ Cell Phone _____

Email _____

I attended the two required EPC meetings on _____ and _____

I am applying for:

☐ **Active Membership** (Meet all membership requirements including three years minimum post-designation practice in estate planning)

☐ **Associate Membership** (Meet all membership requirements with only one or two years post-designation experience. Membership limited to two years. Not eligible for voting rights or Board service.)

Check profession for membership purposes	Professional Discipline	Designation/Credential (circle all applicable)	Year Certified
	Law	Attorney licensed to practice in (list states)	
	Accounting	CPA	
	Financial Planning	Certified Financial Planner (CFP) Chartered Financial Consultant (ChFC) Certified Private Wealth Advisor (CPWA) Chartered Financial Advisor (CFA)	
	Insurance	Chartered Life Underwriter (CLU)	
	Trusts and Estate Management	Trust Officer actively engaged in trust or estate operations or administration who also holds one of the afore mentioned designations or CTFA - Certified Trust and Financial Advisor	
	Planned Giving Professionals	Employee at a charitable organization described in section 501(c)(3) of the Internal Revenue Code or other professionals whose primary business is to provide planned giving services to one or more charitable organizations.	
	Appraisers/ Valuations experts	Certified Valuation Analyst (CVA) Accredited Senior Appraiser (ASA) Accredited in Business Valuation by the AICPA (ABV)	

Council bylaws allow an applicant who holds none of the above credentials, but is exceptionally well-qualified, to be considered for membership in the Board of Directors' discretion. Academics and government officials may fall into this category. If you hold none of the above credentials but believe you are exceptionally well-qualified for membership, please attach a detailed, narrative explanation of your relevant professional history and experiences, including any other relevant background information, in support of your application. In addition, each of your two sponsors must include a separate letter of support.

I have been actively involved in estate planning for at least three years (Active membership) or one year (Associate membership). Please share some examples. You may provide up to two additional pages.

Employment History: List in chronological order, with most recent first, all employment after college. Mark with an * those periods when you were regularly engaged in estate planning and provide the starting and ending months for those periods. If there is a break in the timeline of your active employment, please provide information regarding your professional or other experiences during that time, if any (e.g., maternity leave, school). This information will be used to verify that nominee has had the requisite number of years of estate planning practice. If additional space is needed, please attach a separate page to this nomination form.

From	To	Employer	Job Title/Job Description
From	To	Employer	Job Title/Job Description
From	To	Employer	Job Title/Job Description
From	To	Employer	Job Title/Job Description
From	To	Employer	Job Title/Job Description

Have you previously been a member of any other Estate Planning Council?

Yes___ No___ Which Council? _____ Dates _____

Applicant's Signature _____ Date _____

Sponsorship Note: Two current members must sponsor the applicant. No more than one sponsor may be from the same firm as the applicant. Of the two sponsors, one must be from a discipline different from the applicant.

Recommended by:

Member Sponsor's Name	Member Sponsor's Name
Member Sponsor's Signature / Date	Member Sponsor's Signature / Date

Estate Planning Council of Montgomery County, Maryland, Inc.

About Us...

The Estate Planning Council of Montgomery County, Maryland, Inc. is an interdisciplinary organization established for professionals involved in estate planning, providing its members with opportunities to enhance their skills and expand their network through programs and interaction. The Council has multiple meetings each year, offering speakers who discuss topics related to estate planning. Council members and their guests may attend. All events are held at Kenwood Country Club, unless otherwise noted below.

Membership Requirements

To be eligible for membership in this Council, one must be currently engaged in estate planning on a regular basis and be able to collaborate strategically with colleagues in a variety of disciplines to further clients' estate planning goals. Members may be professionals in the investment, insurance, financial planning and trust industries but must be fiduciaries whether employed by a bank, trust company or other financial institution and must hold one of the credentials listed on the application.

For nominees who hold multiple credentials, please apply for the discipline in which you are currently practicing.

In addition, qualified applicants will have:

- ◆ Three years (a minimum of one year for Associate member applicants) of identifiable experience in the estate planning area.
- ◆ Attendance at two Council meetings before applying for membership.
- ◆ Sponsorship by two current members, one from the same discipline as the applicant, but no more than one sponsor may be from the same firm as the applicant.

Each completed application for membership must be submitted to the Membership Committee with:

1. A current biographical statement and
2. Dues payment:
Active Member - \$300
Associate Member - \$150

The Board of Directors will consider each application and then vote to approve or disapprove membership. The Membership Committee Chair will thereafter notify the applicant of the result.

Please direct your questions or mail your application to:

Beth Hare
EPC of Montgomery County, Maryland, Inc.
P.O. Box 114
Maugansville, MD 21767
info@epcmoco.org