

# Estate Planning Council of Montgomery County, Maryland, Inc.

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## 2023 - 2024 Membership Application

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

Title \_\_\_\_\_

Address \_\_\_\_\_

Business Telephone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

I attended the two required EPC meetings on \_\_\_\_\_ and \_\_\_\_\_

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 (Please share some examples. You may provide up to two additional pages)

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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 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 check for the \$275 membership fee, payable to "Estate Planning Council of Montgomery County, Maryland, Inc." and
2. A current biographical statement

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:

Dina Land  
EPC of Montgomery County, Maryland, Inc.  
P.O. Box 5153  
Arlington, VA 22205  
703-532-8778  
info@epcmoco.org