



2008-2009 Membership Application

FULL NAME

BUSINESS NAME

ADDRESS

CITY, STATE, ZIP

BUSINESS TELEPHONE

BUSINESS FAX

E-MAIL

Membership Classification²: Check only one

- Practicing Attorney
- CPA
- Trust Officer
- Financial Services Professional
(CLU or ChFC or CFP) circle all credentials
- Financial Services
(Non-Credentialed with _____ years experience)
- Miscellaneous (Appraiser)
- Planned Giving Specialist/Consultant
- Other (Identify) _____

TITLE AND PROFESSIONAL CREDENTIALS (IF ANY)

POSITION HELD

Describe Activities in Estate Planning: _____

- Regular Members¹ \$125.00 (Includes all meals)
- Emeritus Members \$25.00 (Does not include meals)

¹ Regular members are entitled to a discount for EPC Day IV - Date: TBA

² Membership is limited in each category. When quotas are filled, applicants will be placed on the waiting list and advised of such action.

All Meetings are located at the Duquesne Club
2008-09 EPC Pittsburgh Calendar of Events (*coming soon*)

Membership Chairperson

Sally A. Davoren; Carnegie Museums of Pittsburgh
412-578-2478 • davorens@carnegiemuseums.org

Forward Application and Payment to:

The Estate Planning Council of Pittsburgh
1601 Penn Avenue, Suite 611
Pittsburgh, PA 15221

Payment Amount: \$ _____

- Check Enclosed
- Credit Card: () AMEX () Master Card () Visa

Account Number: _____

Expiration Date: _____

Name and Address as it appears on Credit Card:

SIGNATURE / DATE

Questions? Contact Estate Planning Council of Pittsburgh office by phone 412-243-4315 or Email info@epcpittsburgh.org

www.epcpittsburgh.org

To The Sponsors

Applications for new membership requires sponsorship from two members in good standing with the Estate Planning Council of Pittsburgh. The sponsors should state succinctly, the reasons for believing the applicant should be a member of the Estate Planning Council of Pittsburgh. Please indicate whether the applicant is doing work in connection with estate planning and/or trusts.

Sponsor 1

Print Name: _____ Signature: _____

Sponsor 2

Print Name: _____ Signature: _____