



Estate Planning Council of Pittsburgh

2018-2019 Membership Application

FULL NAME _____

DESIGNATIONS _____

TITLE _____

BUSINESS NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

BUSINESS TELEPHONE _____ FAX _____

E-MAIL _____

WEBSITE _____

Membership Classification (*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) _____ *

* _____ years of exp. in the estate planning field. Please attach current resume.

TITLE AND PROFESSIONAL CREDENTIALS (IF ANY) _____

POSITION HELD _____

Describe Activities in Estate Planning: _____

■ Regular Members \$175 if accepted into membership by June 30, 2018.

\$190 if accepted for membership after June 30, 2018. Includes all meals at Membership Meetings held at the Duquesne Club and social events. Regular members are also entitled to discounted admission at the Financial "Four"um on November 1, 2018

■ Emeritus Members \$25.00

Does not include meals.

Forward Application, Sponsor Recommendations and Payment to:

The Estate Planning Council of Pittsburgh
c/o Ann W. McKenna, Council Executive
P.O. Box 97795, Pittsburgh, PA 15227

Payment Amount: \$ _____

- Check Enclosed
- Credit Card: Payments may be made with Visa, MC or Amex after accepted into membership by going online to www.epcpittsburgh.org or calling Ann McKenna at 412-655-4447

Mark your calendar for these EPC meetings:

July 12, EPC Mixer
September 20, Lunch
November 1, 10th Annual Fin'l "Four"um
January 17, Dinner
March 21, Lunch
May 16, Lunch

For the most current event information, please visit www.epcpittsburgh.org

Please note that the Board of Directors of the Estate Planning Council of Pittsburgh reserves the right to request additional information from applicant. Questions? Contact The Estate Planning Council of Pittsburgh by phone at 412-655-4447 or e-mail epcpittsburgh@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: _____