Estate Planning Council of Pittsburgh
2023 – 2024 Membership Application

Name _____

Designations _____

Title _____

Business Name _____

Address _____

City, State, Zip _____

Business Phone _____

Cell # (will be used for text messages) _____

Email _____

Supplemental Email _____

Website _____

Membership Classification (Check only one):

Practicing Attorney _____
CPA ____
Trust Officer _____
Financial Services Professional (CLU®, CFP®, ChFC®, CPWA®, CFA, CAP®, CSPG, CTFA, MSFS, and MST) circle all credentials _____
Financial Services* (Non-Credentialed with _____ years experience
Miscellaneous (Appraiser CVA, ABV, ASA)* _____
Planned Giving Specialist/Consultant* _____

Other (Identify) _____
*_____ years of exp. in the estate planning field. Please attach current resume.

Describe Activities in Estate Planning _____

_____

Regular Members $190 after accepted into membership.

Includes all meals at Membership Meetings held at the Duquesne Club and social events.

Please note that the Board of Directors of the Estate Planning Council of Pittsburgh reserve the right to request additional information from applicant.

Send complete application and 2 sponsor recommendations to:
The Estate Planning Council of Pittsburgh
c/o Ann W. McKenna, Council Executive
P.O. Box 97795, Pittsburgh, PA 15227
Or email to epcpittsburgh@epcpittsburgh.org

Once accepted into membership, a check payable to "Estate Planning Council" for $190 may be sent to the address above. To pay by credit card, call Ann McKenna at 412-655-4447.

Mark your calendar for these EPC meetings:

September 21, Lunch and Annual Meeting
November 9, Fall Social
January 18, Dinner
March 14, Lunch
May 16, Lunch

For complete details, go to:
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: _____