



Estate Planning Council of Pittsburgh 2019 – 2020 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. Regular members are also entitled to discounted admission at the 11th Annual Financial "Four"um on October 30, 2019

Emeritus Members \$25.00

Does not include meals or socials. Discounted admission at the 11th Annual Financial "Four"um on October 30, 2019 is applicable.

Please note that the Board of Directors of the Estate Planning Council of Pittsburgh reserves 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:

June 27, EPC Mixer
September 26, Lunch
October 30, 11th Annual Fin'l "Four"um
January 16, Dinner
March 26, Lunch
May 14, 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: _____