

# *Estate Planning Council of Pittsburgh 2020 – 2021 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 12th Annual Financial "Four"um on October 29, 2020.

*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](mailto: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 2<sup>nd</sup> Lunch  
 October 21<sup>st</sup> 12th Annual Fin'l "Four"um  
 January 2<sup>nd</sup> , Dinner  
 March 2<sup>nd</sup> Lunch  
 May 1<sup>st</sup> Lunch

*For complete details, go to:  
[www.epcpittsburgh.org](http://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**

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Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_

## **Sponsor 2**

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Print Name: \_\_\_\_\_ Signature: \_\_\_\_\_