



## ***Estate Planning Council of Pittsburgh 2025 – 2026 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 \$210 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](mailto:epcpittsburgh@epcpittsburgh.org)*

Once accepted into membership, a check payable to "Estate Planning Council" for \$210 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 25, Lunch and Annual Meeting  
November 13, Fall Social  
January 22, Dinner  
March 19, Lunch  
May 14, 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**

---

---

---

---

---

---

---

---

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

## **Sponsor 2**

---

---

---

---

---

---

---

---

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