



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.

Scan complete application and 2 sponsor recommendations and email to: epcpittsburgh@epcpittsburgh.org

Once accepted into membership, the dues may be paid via a link provided afterwards.

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

June 18, Summer Social

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: _____