



**ESTATE PLANNING COUNCIL OF NORTHERN NEVADA
MEMBERSHIP APPLICATION**

1. **Name:** _____

2. I have the requisite license and experience:

Profession (title and number) : License/Credential Number & State:

- Attorney, CPA, CFP, ChFC, CLU, Trust Officer,
 Registered Private Fiduciary, Affiliate

3. I am applying for the following membership:

- a. **Full Member:** I am licensed and have _____ years' experience in estate planning; **or**
b. **Member Applicant:** I am not yet licensed, or do not have 2 years' experience, and seek approval as a Member Applicant. I understand I must qualify for Full Membership within 5 years, and that my attendance at regular meetings is restricted to the Carson City sub-chapter meetings, the extended CLE event in May and the Annual meeting; **or**
c. **Lifetime Member:** I seek to have my Membership modified to reflect that I am Lifetime Member. I joined this organization in _____, have been a member of this organization for 25 years and have attained the status of Lifetime Member.

4. My work contact information is as follows:

- a. Business/Employer: _____
b. Business Address: _____
c. Business Telephone Number: _____
d. Cell Phone: _____
e. E-mail: _____

5. I would like Reno or Carson City to be my primary meeting location. (I understand that my membership fee includes free breakfast meetings at the location I select. As a Full Member, I may attend the meetings at the other location by paying for my meal).

6. The following people have recommended me for membership (1 reference needed for Full Members, 2 references for Affiliates and Member Candidates, none needed for modification to Lifetime Member, applications submitted without recommendations will be rejected):

(1) Name, printed: _____

Signature : _____

Date: _____

(2) Name, printed: _____

Signature: _____

Date: _____



**ESTATE PLANNING COUNCIL OF NORTHERN NEVADA
MEMBERSHIP APPLICATION**

7. **Summary of experience:** Please include a brief summary of your background and how long you have been involved in an estate planning field.
8. **Dues:** Membership dues are \$135 per year; fees are prorated to 50% after April 1st as our fiscal year end is August 31. You will be billed when your application is accepted.

I understand the experience and membership requirements as well as the dues, included events and refund policy as identified in the Instructions & Definitions to this Application (page 2 & 3), and seek membership in the Estate Planning Council of Northern Nevada.

Name, printed: _____

Signature : _____

Date: _____

Return to: Estate Planning Council of Northern Nevada
P.O. 21413, Reno NV 89515

Or e-mail this application to Ludmila Popper at epcnnevada@gmail.com

Board Approved:

Ludmila Popper, Council Secretary

Date



ESTATE PLANNING COUNCIL OF NORTHERN NEVADA MEMBERSHIP APPLICATION

Instructions & Definitions

Eligibility: Membership in this Council shall consist of following categories:

1. **Full Member:** All Members in this category must have engaged in estate planning, accounting, etc. as a primary practice area for no less than two years AND be licensed and in good standing with the appropriate state or federal licensing authority. Each member must meet the minimum credential requirements listed by their respective governing bodies.
 - a. **Attorney:** Must be a member of the State Bar of Nevada
 - b. **Certified Public Accountant:** Must be licensed by the Nevada State Board of Accountancy
 - c. **Financial Planner:** Must have either a ChFC (Chartered Financial Consultant) designation or CFP® (Certified Financial Planner) designation
 - d. **Life Insurance Agent:** Must have a Chartered Life Underwriter (CLU) designation
 - e. **Trust Officer or Private Fiduciary:** Must be employed by a corporate trust company, be currently registered as a private professional conservator with a Superior Court of Nevada, actively engaged as a private fiduciary or actively engaged in banking with estate planning service offerings
2. **Affiliated Member:** Must be an individual actively engaged in estate planning and whose principal business activity will contribute to the Council and is NOT practicing law, accounting, financial planning, life insurance or trust administration. An Affiliated Member cannot compete with a Full Member's profession.
3. **Member Applicant:** Must be a person working in one of the above professional categories but has not attained the requisite years of experience, designation or credential to apply as a Member. **
4. **Lifetime Member:** Must have been a Member of the Estate Planning Council of Northern Nevada for 25 years. This category of membership does not require dues.
5. **Recommendations:** Please do not ask current board member's for a recommendation. This allows all Board Members to act in their board capacity.
6. **Payment for dues/events:** We accept credit cards, checks and cash for all events that are not included in your yearly membership. If you register and do not attend a meeting, we will bill you for your attendance (even if it was technically included in your membership). If you register and cancel by the Friday prior to the event, you will receive, a) a full credit toward a future event (within 2 calendar years), or b) a check will be mailed to you after we deduct a 15% processing fee.

**Member Applicant memberships are limited as follows: Members must choose Carson City as their primary location and may only attend 1 breakfast meeting in Reno each year. Member Applicants must qualify as a Member within 5 years of becoming a Member Applicant. Member Applicants must refer to themselves as Member Applicants of the council and not as Members in resumes and other biographical materials.