

Maine Estate Planning Council

Application for Membership

Eligibility: The Maine Estate Planning Council Bylaws state membership in the corporation shall be open to lawyers, trust officers, certified public accountants, chartered life underwriters, chartered financial consultants, and certified financial planners. Others not actively engaged in the foregoing professional disciplines, but who play an integral role in the estate planning process, may be eligible for membership, subject to Board approval on a case-by-case basis.

Applicant Information:

Name: _____

Business Name: _____

Address: _____

Telephone: _____

Email: _____

Qualifications:

Lawyer

CPA

ChFC

Trust Officer

CLU

CFP Certificant

CFA

If you are not actively engaged in one or more of the foregoing professional disciplines, please answer the following questions in detail. Attach a separate page if necessary.

1. Please describe in detail your role in the estate planning process. What kinds of things do you do on a regular basis that contributes to this process? _____

2. Please state your reasons for wanting to become a member of the MEPC.

3. Please write a brief statement about how you feel you will contribute to the MEPC if you are accepted into membership. _____

4. Sponsorship by one or more current members of the Maine Estate Planning Council is required for prospective members who are not engaged in one of the approved professional disciplines. Please give us the name(s) of your sponsor(s). _____

Membership Dues: Upon meeting the criteria for membership, payment of annual dues in the amount of \$100 will be required **via PayPal only. We no longer accept physical checks.** You will receive instructions once your application is reviewed for acceptance.

Submit this membership application via email to: MaineEPCouncil@gmail.com