Santa Clara County Estate Planning Council
New Member Application

Eligibility: New members must meet minimum requirements of their category.

Articles of Association, Section III. Membership

1. *Attorneys*: Must have practiced law for two years and be a member of the State Bar of California. In addition, must meet one of the following requirements:

(a) Be designated a Certified Specialist in Taxation Law, and/or Estate Planning, Trust a Probate Law, by the State Bar of California, Board of Legal Specialization.

(b) Be a member of the Section of Taxation or Section of Real Property, Probate and Trust Law of the American Bar Association.

(c) Be a member of the Tax Section or Estate Planning Trust and Probate Law Section of the State Bar of California.

(d) Be a member of an equivalent section or committee of the County Bar Association in the County in which they are practicing.

2. *Certified Public Accountants*: Must have practiced two years and be a member in good standing of their Chapter of the California Society of Certified Public Accountants or the American Institute of Certified Public Accountants.

3. *Trust Officers/California Licensed Professional Fiduciaries*: Must have been active in the Trust field for two years and be an Officer of their Bank or Trust Company or be a Certified Trust Financial Advisor. California Licensed Professional Fiduciaries must have at least two years' experience as a licensed fiduciary and be a General Member of the Professional Fiduciary Association of California (PFAC). Individuals who have at least two years' experience as a Trust Officer according to (a) above but less than two years' experience as a Licensed Professional Fiduciary will qualify if they meet the other qualifications in this category.

4. *Life Underwriters*: Must be a Chartered Life Underwriter (CLU) and/or a Chartered Financial Consultant (ChFC)and a member of The Society of Financial Service Professionals and a member of The Nation Association of Insurance and Financial Advisors (NAIFA)

5. *Other Estate Planning Professionals*: Qualified persons who do not practice their profession within the first four categories may be eligible for membership in this category. The Board of Director shall decide whether a person who applies for a membership in this category is sufficiently active in Estate Planning to warrant membership in the Council. The following individuals are deemed to meet these requirements:

(a) Members of the development office of a Charitable or other Non-Profit organization or individuals whose business consists of being charitable gift planning consultants, and who have practiced in the field for a minimum of two years.

(b) Investment advisors who have a minimum of two years of experience and carry either a Certified Financial Planner (CFP®), Charter Financial Analyst (CFA), or Certified Investment Management Analysts (CIMA) designation and are members of the Financial Planning Association (FPA) or their applicable professional organization.

(c) Individuals who are in the valuation or appraisal business who hold an American Society of Appraisers (ASA), Certified Valuation Analysis (CVA), Member Appraisal Institute (MAI), or an Accredited Business Valuation (ABV) credential with at least two years of experience in the field.

(d) Individuals who are either actuary or pension consultants and who have two years of experience and are either Full Service Actuaries (FSA) or Qualified Pension Administrators (QPA) and are members of either the American Academy of Actuaries, American Society of Pension Actuaries, American Society of Pension Professionals and Actuaries (ASPPA) or Society of Actuaries or are Certified Pension Consultants (CPC).

(e) Individuals who can show that they have at least two years of experience in the Estate, Trust and/or Charitable field and who the Board, in its discretion, believes would be valuable contributors to the membership.

Note: Per the Articles of Association – all members are required to attend a minimum of four programs per fiscal year

Required Information for New Members

Name:____Designations:__________________________

Company:____

Address:____

Telephone:______________________Mobile Phone:______________________*(for text notification of meeting updates)*

Email:____

1. Profession

- ☐ Attorney
- ☐ CLU/ChFC
- ☐ CPA
- ☐ CFP®
- ☐ Trust Officer/Calif. Licensed Professional Fiduciaries
- ☐ Other Estate Planning Professional **

2. Eligibility

- ☐ I am a member of the State Bar of California and a member of__________Section
- ☐ I am a Member of the___________Chapter of the California Society of CPAs or American Institute of CPAs
- ☐ I have been active in the Trust field for at least two years and am an Officer of my Bank or Trust Company
- ☐ I am a member of the_________Chapter of SFSP and a member of the______________Chapter of NAIFA

***** As an applicant in the Other Estate Planning Professional Category, the following items support my application:***

• I devote___% of my time to Estate Planning matters for clients.

• I hold the following professional qualifications: ____

• I've attached two letters of recommendation from current members of SCCEPC verifying my practice in the field of Estate Planning for a period exceeding five years.

3. Signature to certify profession and eligibility ____

4. *Attach a resume or personal backgrounder*. This will be used to evaluate your application by the Selection Committee.

5. *Obtain two signatures* from current members.

I am a member of the Santa Clara County Estate Planning Council and hereby recommend the above applicant for membership.

____________________________ ____

Print Name *Signature*

____________________________ ____

Print Name *Signature*

6. *Membership Type and Dues*

- ☐ **Regular Council Membership $95** (Pay for and attend a minimum of 4 additional dinner meetings during the fiscal year at the regular membership fee.)
- ☐ **Premium Membership $370** *(Includes Membership fee and all 8 dinners (savings $85). Members must RSVP for each dinner. No further payments will be due. Unused dinners will not be refunded and cannot be transferred.)*

7. *Mail or scan and email this completed form and your resume to:*

SCCEPC c/o Non-Profit Services
P.O. Box 641461, Omaha, NE 68164
Stacie@Non-ProfitServices.com