

**Santa Clara County Estate Planning Council
New Member Application**

Name: _____ Designations: _____

Company: _____

Address: _____

Phone: _____ Mobile Phone: _____ (for texting meeting updates)

Email: _____

1. Profession & Eligibility (Please review the eligibility criteria at: <https://www.sccepc.org/members/membershipAddl>)

- ☐ Attorney (Section III, Article A1)
- ☐ CPA (Section III, Article A2)
- ☐ Trust Officer/Calif. Licensed Professional Fiduciaries (Section III, Article A3)
- ☐ CLU/ChFC (Section III, Article A4)
- ☐ Other Estate Planning Professional – Members of a Development Office, Investment Advisors, Valuation or Appraisal Professionals, Actuary or Pension Consultants (Section III, Article A5).

2. Signature to certify that I meet or exceed the requirements for membership, as stated in the Articles of Incorporation:

_____ **Member Type:** ☐ Regular ☐ Associate

3. Attach Resume: This will be used to evaluate your application by the Selection Committee.

3.b. If applying as Other Estate Planning Professional, please include a brief written statement outlining your experience as it relates to estate planning.

4. 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.
(a digital, scanned or faxed signature is sufficient)

Print Name

Signature

Print Name

Signature

5. What do you hope to gain from membership in the SCCEPC? _____

6. Do you have presentation and/or speaker ideas for future meetings? _____

7. Are you interested in leadership opportunities with SCCEPC? _____

8. Membership Dues: A dues invoice will be sent upon membership approval. Members are expected to attend a minimum of 4 meetings during the fiscal year. Estimated dinner meeting registration is \$70.

- ☐ Regular & Associate Membership - \$150
- ☐ Premier Membership - \$640 (Includes membership and all meetings - \$230 savings. Members must RSVP for each dinner. No further payments will be due. Unused dinners will not be refunded and cannot be transferred.)

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

SCCEPC c/o Rocket Leadership Services & Consulting
PO Box 141
Boystown, NE 68010

Questions?

Contact Council Executive, Danielle Kleber 402-301-4639 or Danielle@SCCEPC.org