

# Santa Clara County Estate Planning Council

## New Member Application

Name: \_\_\_\_\_ Designations: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_ (for texting meeting updates)

Email: \_\_\_\_\_

**1. Profession & Eligibility:**

- ☐ 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.

**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 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 \$65.

- ☐ Regular & Associate Membership - \$110
- ☐ Premier Membership - \$410 (Includes membership and meetings (\$220 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 Non-profit Services  
PO Box 641461  
Omaha, NE 68164

Questions?

Contact Council Executive, Stacie Sarasio 402.210.9446 or [Stacie@non-profitservices.com](mailto:Stacie@non-profitservices.com)