



# Pinellas County Estate Planning Council

P.O. Box 251, St. Petersburg, FL 33731

info@pinellascountypec.org

## MEMBERSHIP APPLICATION

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

Title: \_\_\_\_\_

Firm/Business: \_\_\_\_\_

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

City, State & Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

## MEMBERSHIP QUALIFICATIONS

- Applicants must qualify within one of the disciplines listed below.
- Applicants must be sponsored by two members with one sponsor being from the same membership category. Applicants applying under the *Member at Large* category must be sponsored by three members, each of whom are from a different membership category.
- A letter of recommendation from each sponsor must be attached.
- Dues shall be attached. If an application is submitted before the May meeting, dues are \$275. If an application is submitted after the May meeting, dues are \$290, which covers the balance of the current year and dues for the following year. Checks shall be payable to PCEPC, Inc.

I am (     ) an Accredited Estate Planner (AEP)

I am (     ) an Attorney at Law

I am (     ) a Certified Financial Planner (CFP)

I am (     ) a Certified Public Accountant (CPA)

I am (     ) a Charitable Foundation Executive (Officer or Director) 501(c)(3)

I am (     ) a Chartered Financial Consultant (ChFC)

I am (     ) a Chartered Life Underwriter (CLU)

I am (     ) a Trust Officer (CTFA)

I am (     ) a Member at Large – actively involved in estate planning, but does not practice in any of the previous categories.

## SPONSOR INFORMATION

Name: \_\_\_\_\_ Firm: \_\_\_\_\_

Discipline: \_\_\_\_\_

Name: \_\_\_\_\_ Firm: \_\_\_\_\_

Discipline: \_\_\_\_\_

*Third Sponsor Only Applicable for Member at Large Applicant:*

Name: \_\_\_\_\_ Firm: \_\_\_\_\_

Discipline: \_\_\_\_\_

## VERIFICATION

I verify that all of the information I have provided in this application is true and correct.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**Pinellas County Estate Planning Council**

*P.O. Box 251, St. Petersburg, FL 33731*

*info@pinellascountyepec.org*

**SPONSOR LETTER**

Date: \_\_\_\_\_

To: Board of Directors  
Pinellas County Estate Planning Council

Re: Membership Application for \_\_\_\_\_

I am personally acquainted with the above applicant and believe this person has sound professional ethics. As a member of the Pinellas County Estate Planning Council, I feel that this applicant will be a credit to the council and will make a responsible contribution to it.

Additional information:

• Length of time acquainted with applicant \_\_\_\_\_

•  Applicant is a member of my firm.

Applicant is not a member of my firm.

• Remarks: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I recommend approval of the above applicant and am pleased to sponsor him/her for membership.

\_\_\_\_\_  
Sponsor's Signature

\_\_\_\_\_  
Sponsor's Name *(please print)*

\_\_\_\_\_  
Sponsor's Firm

\_\_\_\_\_  
Sponsor's Office Telephone Number



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