



Chicago Estate Planning Council

## APPLICATION FOR CEPC'S 2021 EMERGING MEMBERS PROGRAM

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

Position: \_\_\_\_\_

Organization: \_\_\_\_\_

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

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

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

*The Council promotes and encourages diversity in the estate planning profession at all levels.*

*Please Note: Application Deadline is July 22, 2020.*

### *Optional Questions:*

Race and/or Ethnicity: \_\_\_\_\_

Do you have a disability? \_\_\_ Yes \_\_\_ No

Do you identify as LGBTQ? \_\_\_ Yes \_\_\_ No

Is there anything else not covered by the above questions that you would like for us to know about your background as it relates to diversity? \_\_\_\_\_

Qualification: (select one)

J. D. \_\_\_ Certified Public Accountant \_\_\_ Certified Life Underwriter \_\_\_

Chartered Financial Consultant \_\_\_ Certified Financial Planner \_\_\_ American Society of Appraisers \_\_\_

Certified Trust and Financial Advisor \_\_\_ TR \_\_\_ Other \_\_\_\_\_

\_\_\_\_\_ Year Designation Obtained; OR

\_\_\_\_\_ If in process of obtaining designation, year designation expected

Overall percentage of time in current position spent on estate planning: \_\_\_\_\_

Practice Area (select one if you do have or are not seeking a recognized qualification):

Law \_\_\_ Accounting \_\_\_ Life insurance \_\_\_ Financial planning \_\_\_ Wealth Management \_\_\_

Trust and estate administration \_\_\_ Planned Giving \_\_\_ Valuation Service \_\_\_

Length of time that you have been involved with estate planning: \_\_\_\_\_



Other affiliations or employers related to estate planning:

Name and Position: \_\_\_\_\_

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

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

Nature of Work: \_\_\_\_\_

Please name any professional organization(s) in which you are now an active member:

1. Describe why you are interested in the estate planning field. (Please attach your response)
2. Describe your experience in the estate planning field. Include any speaking or writing opportunities and participation and leadership in estate planning organizations. (Please attach your response)
3. Briefly state why you are interested in being appointed as a CEPC Emerging Member. (Please attach your response)

Please email CEPC your completed application by July 22, 2020 to: [info@cepweb.org](mailto:info@cepweb.org)

