



## APPLICATION FOR CEPC EMERGING MEMBERS

Date: \_\_\_\_\_  
Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_

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

*This application form is for graduate students or estate planning professionals who do not yet qualify as an associate member. Please note that an associate member is any person who has a minimum of two years' experience in estate planning and otherwise meets the criteria of regular membership.*

Qualification: (select one)

ASA  CFP  ChFC  CLU  CPA  CPWA  CTFA  CVA  J.D.  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 \_\_\_\_\_ Insurance \_\_\_\_\_ Financial planning \_\_\_\_\_ Wealth Management \_\_\_\_\_

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

List the month and year that you started your professional involvement in estate planning: \_\_\_\_\_

How did you hear about CEPC? (colleague, supervisor, professor, etc.)



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 admitted as a CEPC Emerging Member. (Please attach your response)

Please email CEPC your completed application to: [info@cepcweb.org](mailto:info@cepcweb.org)