

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

Upon receipt of this application, it will be reviewed by the council's membership chair. The applicant will then be interviewed by a member of the board of directors, who will report to the directors. After such submission, the application will be acted upon by the directors.

MEMBERSHIP REQUIREMENTS: (Please check one)

Regular Member applicants must meet the following qualifications:

- 1) Has been engaged in estate planning (defined below) for a minimum of five (5) years as a professional in one or more of the following fields: law, accounting, life or property and casualty insurance, financial planning, wealth management, trust and estate administration, planned giving, or valuation services;
- 2) Has demonstrated a significant commitment to estate planning by either (a) acquiring a recognized credential of his or her profession that enhances his or her ability to provide estate planning services, or (b) making an equivalent contribution to the profession or to his or her professional development and qualifications.

Recognized credentials include ASA, CFP, ChFC, CLU, CPA, CPWA, CTFA, CVA, J.D., TR

Associate Member applicants must have a minimum of two (2) years of experience in estate planning and meet the same general qualifications as a regular member. Years of experience are measured from the date the applicant meets the general qualifications, and not necessarily from the date a professional designation is received. Associate members do not have voting rights.

For the purposes of the above requirement, we have defined the practice of estate planning as follows: "The process of arranging, accumulating, and preserving a person's property, so as to gain maximum benefit of the applicable laws relating to the ownership and transfer of property while carrying out the person's own wishes for the disposition of his or her property during life and upon death."

Please check all functions below that you perform as part of your practice or employment:

- | | |
|--|---|
| <input type="checkbox"/> Provides legal advice related to estate, gift or charitable planning | <input type="checkbox"/> Engages in technical discussions or similar activities with clients or colleagues about proper structure of client's estate plan |
| <input type="checkbox"/> Drafts estate planning documents | <input type="checkbox"/> Administers trusts as a trustee or trust officer |
| <input type="checkbox"/> Reviews estate planning documents | <input type="checkbox"/> Administers estates as an executor, administrator or fiduciary officer |
| <input type="checkbox"/> Provides advice concerning asset protection | <input type="checkbox"/> Prepares fiduciary accountings |
| <input type="checkbox"/> Prepares fiduciary income tax returns | <input type="checkbox"/> Provides advice regarding the use of life insurance in the context of estate and succession planning |
| <input type="checkbox"/> Prepares estate, gift, and GST tax returns | <input type="checkbox"/> Analyzes existing and proposed life insurance for optimal integration with the estate plan |
| <input type="checkbox"/> Provides tax advice related to estate, gift or charitable planning | <input type="checkbox"/> Work with clients to ensure assets are insured in addition to titled or insured in a manner consistent with the estate plan |
| <input type="checkbox"/> Provides advice regarding structure and disposition of a client's estate including charitable gifts | <input type="checkbox"/> Prepares appraisals for estate and gift tax returns |
| <input type="checkbox"/> Advises clients regarding the appropriate structures for the disposition of retirement plan benefits | <input type="checkbox"/> Prepares appraisals for sale advisory and succession planning |
| <input type="checkbox"/> Provides advice relating to succession planning for family-held businesses | <input type="checkbox"/> Prepares valuation discount studies for FLPs and LLCs |
| <input type="checkbox"/> Works with clients to ensure assets are titled or insured in a manner consistent with the estate plan | <input type="checkbox"/> Prepares fractional interest valuation reports |
| <input type="checkbox"/> Advises clients regarding the accumulation and preservation of assets and the integration with various estate planning vehicles | |

PLEASE TYPE/PRINT:

| | |
|--------------|--------------------------------|
| Name | Position |
| Organization | Date of Affiliation/Employment |
| Address | City/State/Zip |
| Email | Telephone |

Primary Membership Qualification: (Check One)
 ASA CFP ChFC CLU CPA CPWA CTFA CVA J.D. TR Other _____

Year Designation Obtained: _____ **Overall Percentage of time spent on estate planning:** _____

Practice Area (check one if you do not have a recognized credential qualification):
 Law Accounting Insurance Financial planning Wealth management
 Trust and estate administration Planned Giving Valuation Services

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

Other affiliations or employers during the past ten years: _____

(Please use separate sheet to list additional affiliations and/or employers.)

| <u>Dates</u> | <u>Name & Address</u> | <u>Position & Nature of work</u> |
|----------------|---------------------------|--------------------------------------|
| _____ to _____ | _____ | _____ |
| _____ to _____ | _____ | _____ |

1. Describe your experience in the estate planning field (including publications and programs you have presented) and why you feel this experience qualifies you for membership in this organization:

2. In addition to your sponsor, please list other CEPC members who can serve as a reference on your behalf in respect to your estate planning experience:

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

The CEPC By-laws provide, in part, that “The purposes for which the Council is organized are: 1) To maintain the highest standards of service in providing informed guidance in the creation, conservation, and distribution of estates and trusts; 2) To continue and further the education of its members and the public in estate planning matters; 3) To increase public understanding of the need for competent estate planning; 4) To promote cooperation, and to foster a better understanding of the proper relationship among estate planning specialists from different fields and to bring together in one association those specialists who have a common interest in promoting the Council’s purposes; 5) To encourage the highest standards of ethical conduct.”

The undersigned hereby applies for membership in the Chicago Estate Planning Council and submits the above information in support of this application. I affirm that I have read and understand the purposes of the Council and that I will not use my membership in any form of advertisement or for solicitation of business.

Signature

Date

Return completed application to Chicago Estate Planning Council
info@cepcweb.org