



Date: _____

To: BOARD OF DIRECTORS
CHICAGO ESTATE PLANNING COUNCIL

RE: Sponsor Form for the following Applicant:

Name

Firm/Organization	Email	Telephone#
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Applicant's Recognized Credential:

- | | |
|---|---|
| <input type="checkbox"/> ASA - Associate of the Society of Actuaries
<input type="checkbox"/> CFP - Certified Financial Planner
<input type="checkbox"/> ChFC - Chartered Financial Consultant
<input type="checkbox"/> CLU - Certified Life Underwriter
<input type="checkbox"/> CPA - Certified Public Accountant | <input type="checkbox"/> CPWA - Certified Private Wealth Advisor
<input type="checkbox"/> CTFA - Certified Trust and Financial Advisor
<input type="checkbox"/> CVA - Certified Valuation Analyst
<input type="checkbox"/> J.D. - Juris Doctor |
|---|---|

Length of time acquainted with applicant: _____ **Is applicant a member of your firm?** ____ Yes ____ No

By checking the following boxes, you are indicating that to the best of your knowledge the Applicant meets the membership requirements as contained in Article III of the Council's Bylaws.

BOTH OF THE FOLLOWING BOXES MUST BE CHECKED:

- 1. The Applicant is currently engaged in estate planning (defined below) as a professional in the fields of law, accounting, insurance, financial planning, wealth management, trust and estate administration, planned giving, or valuation services;
- 2. The Applicant has engaged in estate planning as a professional for a minimum of five years for regular membership or two years for associate membership.

ONE OF THE FOLLOWING BOXES MUST BE CHECKED:

- 3. The Applicant has demonstrated a significant commitment to estate planning either by:
 - Acquiring a recognized credential of his or her profession that enhances his or her ability to provide estate planning services [Recognized credentials shall include JD, CPA, CFP, CPWA, CLU, ChFC, ASA, CVA, CTFA and other such credentials as the Board shall from time to time approve]

OR

- By making an equivalent contribution to the profession or to his or her professional development and qualifications

We define estate planning as 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.

If the applicant does not have a Recognized Credential, please provide detail as to how the applicant has made an equivalent contribution to the profession or his or her professional development and qualifications.

Please describe your interactions with the applicant in an estate planning context.

By signing this form, you acknowledge that you believe the applicant possesses the professional expertise and the ethical standards consistent with the purposes of the council as set forth by the By-Laws.

I am a current CEPC Member and I recommend approval of the above applicant. I am pleased to sponsor the membership, and I believe the applicant will further the purposes of the Council.

Signature of Sponsor

Sponsor's Name (Please Print)

Telephone Number

Sponsor's Firm

Email

Return completed application to Chicago Estate Planning Council

info@cepcweb.org