



NEW ORLEANS ESTATE PLANNING COUNCIL
MEMBERSHIP APPLICATION

Name: _____

Firm Name: _____

Mailing Address: _____

_____ Zip Code: _____

Phone: _____ Fax: _____ E-mail: _____

Please select your membership discipline by circling A, B, C, D, E or F.

- A. I am an **Attorney** and have been admitted to practice in Louisiana for _____ years.
Law degree from _____. I am a member of the Louisiana Bar Association.
- B. I am a **CPA** and have practiced accounting for _____ years.
I am a member of the Society of Louisiana CPA's.
- C. I am a **Life Insurance** professional for _____ years.
Circle all that apply: I am a CLU ChFC MSFS I am a member of NAIFA Society of FSP
- D. I am engaged as a **Financial Planner** for _____ years.
Circle all that apply: I am a CFP ChFC I am a member of FPA Society of FSP
- E. I am a **Trust Officer** and have Trust Officer responsibilities for _____ years.
- F. I am a **Planned Giving Officer** and/or **Development Director** for _____ years

If you have given talks, written articles or appeared on panels with regard to the various phases of Estate Planning please attach a brief summary to this application.

Please complete the below inquiries:

- Would you be interested in joining one of the below committees? Please check all that apply:
- **Programs** _____
 - **Sponsorship** _____
 - **Governance** _____
 - **Membership** _____
 - **NAEPC Ad Hoc** _____

- Would you be interested in being a speaker?

- Know of a potential speaker?

- Do you have a suggestions for a program topic?

- Is your firm interested in sponsorship?

- Would you like to learn about our Accredited Estate Planner® Designation (AEP)®?

I have been actively engaged in various phases of Estate Planning for _____ years.

Signature _____ Date: _____

Sponsored by: _____ Print name: _____

2nd Sponsor: _____ Print name: _____

At least one sponsor must be in the same profession as the applicant. Applicants who have been actively engaged in Estate Planning within their own profession for a minimum of three years may apply for full Membership. Applicants with less than three years' experience can apply for Associate Membership.

Initiation fee of \$100 plus \$275 first year's dues will be due upon acceptance

Return form/fee to: New Orleans Estate Planning Council * P.O. Box 750357 * New Orleans, LA 70175

Questions? Phone: 504-957-8469 * www.noepc.org * admin@noepc.org * TIN: 72-0818406