

**SPOKANE ESTATE PLANNING
COUNCIL APPLICATION FOR
MEMBERSHIP**

Tax ID# 91-0951963

The purpose of this Council is to study and discuss topics germane to the field of estate planning. Related aspects of estate planning should be considered systematically in a technical and professional manner. There are many incentives to becoming a member including continuing education credits, educational information, networking, and many more.

Memberships are not transferable. They are issued upon an individual basis, so attendance will be by individual members only. Applicants must be sponsored by two members in good standing. All prospective members must be in good standing with their regulatory and/or professional association.

Are you presently under investigation by a professional disciplinary board or governing body or have you previously been found in violation of professional standards by the respective professional disciplinary board or governing body? If yes, please attach a letter of explanation to your application.

_____ Yes _____ No Please Initial _____

Each member is expected to attend every meeting, or RSVP 48 hours in advance of the meeting if unable to attend. Failure to attend three (3) consecutive meetings in a fiscal year, without reasonable excuse communicated to the Council's Administrative Assistant at least 48 hours in advance of the meeting, may cause a forfeiture of membership. In such case, no refund will be made on any paid membership fee (see page two of application regarding membership dues).

Please mail applications to: Spokane Estate Planning Council, PO Box 1656, Spokane, WA 99210-1656

APPLICANT

NAME

DESIGNATIONS

COMPANY NAME

TELEPHONE

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FAX

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**E-MAIL AND
CO. WEBSITE**

MAILING ADDRESS

CITY, STATE, ZIP

ACCOUNTING FINANCIAL PLANNING INSURANCE

**CLASSIFICATION
OF MEMBERSHIP**

LAW TRUST & PLANNED GIVING ALLIED PROFESSIONS

(See Next Page)

EMERITUS STUDENT/EMERGING PROFESSIONAL

I HAVE FULL KNOWLEDGE OF THE CONDITIONS OF MEMBERSHIP AND AGREE TO THE TERMS THEREOF.

APPLICANT'S SIGNATURE

DATE

SPONSOR'S SIGNATURE

PRINT NAME/DESIGNATION

SPONSOR'S SIGNATURE

PRINT NAME/DESIGNATION

All prospective members must be in good standing with their regulator and/or professional association and be actively engaged in estate planning and must qualify and apply under one classification of membership:

- **“Accounting”** - Must hold a Certified Public Accountant license issued by the Washington or Idaho State Board of Accountancy.
- **“Financial Planning”** – Must hold one of the following designations: CERTIFIED FINANCIAL PLANNER[™] (CFP[®]), Certified Public Accountant/Personal Financial Specialist (CPA/PFS), or Chartered Financial Consultant[®] (ChFC[®]), Chartered Financial Analyst (CFA) and be registered with Washington or Idaho as an investment advisor representative.
- **“Insurance”** – Must hold a Washington or Idaho life insurance license and the Chartered Life Underwriter[®] (CLU[®]) designation.
- **“Law”** – Must hold a Juris Doctor (JD) or equal degree and belong to the Washington or Idaho State Bar Association.
- **“Trust & Planned Giving”** – Membership in this classification is limited to trust officers or other individuals working significantly in a fiduciary capacity as well as individuals who, on a full-time basis, are actively engaged with respect to charitable and planned giving matters. Although members are not required to hold any professional designation, the Certified Trust & Financial Advisor (CTFA) and/or Certified Specialist in Planned Giving (CSPG) are desirable.
- **“Allied Professions”** – Must be either an academician or a service specialist whose expertise is directly relevant to estate planning. The Membership Committee reviews all applications for membership in this classification on a case-by-case basis and eligibility for this classification is construed narrowly.
- **“Emeritus”** – After ten years or more of active membership and the attainment of age 62, a member who has retired (is no longer engaged in the conduct of business or a profession) may apply for this classification. Membership in this classification is non-voting.
- **“Student/Emerging Professional”** – Must be either (1) a currently enrolled student pursuing a degree which would lead towards eligibility in another classification, or (2) an emerging professional, currently employed in the estate planning field, actively working to obtain a professional designation which, if obtained, would qualify for membership in the Council in another membership classification. Membership in this classification is non-voting and is limited to a period of 36 months.

Membership dues are payable September 1st for the fiscal year July 1st through June 30th and **are not pro-rated**. Membership dues for all classifications (except Emeritus and those members on a waiting list) are \$255.00 per year and are due upon approval of membership. Membership dues incorporate the cost of the four dinner meetings (including the meals) and the full- day seminar in May (including lunch). The social hour before each evening meeting is a non-hosted cash bar.

Meetings are held five (5) times each year, typically on the second Tuesday of each meeting month, except when requirements of venue or speakers make a change necessary. Dinner meetings are held in the months of September, November, January and March. A full-day seminar is held in May. Meeting information can be found on our website www.spokaneepc.org/council/about.

New applicants in the "Law" classification are likely to be on a waiting list. The bylaws provide that in such circumstances, those individuals may fully participate in all of the activities of the organization, except that they shall not have voting rights. Annual membership dues for those on the waiting list are \$170.00 per year.