

**Central Florida Estate Planning Council, Inc.
Associate Status Application**

Applicant Information

Name _____
Firm _____
Title _____
Address _____
City, State, Zip Code _____
Telephone _____
Facsimile _____
Email _____

Description of Associate Status

Associate Status with the Central Florida Estate Planning Council, Inc. (“CFEPC” or “the Council”) has been adopted as a way for individuals to become affiliated with the Council who do not otherwise qualify for Membership in the Council. Associate Status does not confer voting rights, nor any other rights and benefits associated with Membership with the Council, except at the sole discretion of the Council’s Board of Directors. Associate Status does permit Associates to attend regular Council meetings and events.

Associate Status Criteria

- An Associate must exhibit the ability to bring value to the Council in a manner that is not reflected by the Council’s membership.
- A prospective Associate shall complete an application process as prescribed by the Council’s Board of Directors.
- An applicant for Associate Status may only be accepted as an Associate upon unanimous vote of the Council’s Board of Directors at a meeting that a quorum is present, and such vote shall be by anonymous ballot.
- An application of an applicant shall be denied by the Council’s Board of Directors at the sole and absolute discretion of the Board of Directors, with or without cause.
- Once accepted as an Associate, there will be a probationary period of a minimum of two years. During the probationary period Associate Status may be revoked upon the objection by a Member of the Council and at the reasonable discretion of the Council’s Board of Directors.
- Once accepted as an Associate, the Associate shall pay the same dues as Council members.

Associate Status Application Process

An applicant for Associate Status shall complete an application process as prescribed by the Council’s Board of Directors. The proposed Associate shall:

- submit two (2) references from the Council’s membership,
- attend two (2) meetings as a guest,
- provide a letter to the Board of Directors indicating why the proposed Associate brings value to the Council, why the proposed Associate desires to be an Associate and what the proposed Associate wishes to accomplish as an Associate,
- submit a minimum of three (3) references other than Council members, and
- at the discretion of the Board of Directors, be interviewed by three (3) members of the Council’s Board of Directors only at regular meetings of the Board of Directors.

By signing this Associate Status Application, the Applicant acknowledges that he/she has read the rules applicable to Associates of the Council. The Applicant further certifies that all information provided by Applicant in connection with this Associate Status Application is true and correct:

Applicant Signature _____
 Print Name _____
 Date _____

Send completed Associate Status Application, all documentation and check for \$275(or \$280 if including Printed Directory) payable to the Central Florida Estate Planning Council, Inc. to:

Ms. Mia Drury
 SunTrust Bank
 400 Park Avenue South, Suite 200
 Winter Park, Florida 32789
 (407) 621-6280
 mia.drury@suntrust.com

For Council Use Only

Member Reference 1 _____
 Member Reference 2 _____
 Guest Meeting Attendance Dates _____
 Letter to Board of Directors _____
 General References _____
 Board of Directors Interview _____
 Completion of Probationary Status _____