



**CENTRAL FLORIDA ESTATE PLANNING COUNCIL
MEMBERSHIP APPLICATION FORM 2016-2017**

(Please print or type)

IMPORTANT – PLEASE RETURN BY JULY 24th TO BE INCLUDED IN THE DIRECTORY

Name & Designation(s): _____
Area of Concentration: _____
(Max 50 Characters including spaces) _____
Firm Name: _____
Firm Address: _____

Office Phone: _____
Fax Number: _____
E-Mail address: _____

Receive & Reply to Meeting Notices Via E-mail Yes No
Receive Printed Directory Yes (Please add \$5 to your check) No

1. I have been a resident of Central Florida for _____ years.
2. I have been actively engaged in estate planning for _____ years.
3. The discipline through which I am applying for membership is checked below. I meet all requirements described for this discipline. **(Choose only one).**

- _____ (a) Trust Officer of a trust company or bank maintaining a trust department. I am actively engaged in estate planning, trust investments, or personal and corporate trust administration.
- _____ (b) Life Underwriter with a Chartered Life Underwriters designation. I am a current member of the FSP (Society of Financial Services Professionals).
- _____ (c) Attorney at Law and a member of the Florida Bar.
- _____ (d) CPA registered to practice by the Florida State Board of Accountancy, or a CPA registered to practice in a state other than Florida and employed by a Florida CPA firm.
- _____ (e) AEP, CFP, ChFC, Officers of Charitable Organizations, or Full-Time Professor (teaching at accredited colleges or universities in Central Florida in the areas of estate planning and/or taxation).

Date: _____ Signature: _____

Recommended by Current Members:

(1) _____ (Signature)	(2) _____ (Signature)
_____ (Print or Type Name)	_____ (Print or Type Name)
_____ (Discipline)	_____ (Discipline)

(ONE OF THE ABOVE MUST BE OF THE SAME PROFESSION AS APPLICANT)

All applications are subject to approval by the Membership Committee and the Executive Committee in accordance with the By-Laws of the Council. For more information, contact Karen Lee Fatt, at 407/291-6400 or mbabione@bkc-cpa.net. Please direct future address changes to our meeting coordinator, Mia Drury at 407.621.6271 or email miaatmk@aol.com.

**PLEASE INCLUDE CHECK FOR \$275.00 FOR MEMBERSHIP DUES (or \$280 if including Printed Directory)
(PAYABLE TO THE CENTRAL FLORIDA ESTATE PLANNING COUNCIL or CFEPC)**

**MAIL TO: MS. MIA DRURY
SUNTRUST BANK
400 PARK AVE., SOUTH, 2ND FLOOR
(MC: FL-WINTER PARK-9822)
WINTER PARK, FL 32789**