



CENTRAL FLORIDA ESTATE PLANNING COUNCIL
MEMBERSHIP RENEWAL 2017-2018

(Please print or type)

IMPORTANT – PLEASE RETURN BY JULY 28TH 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
I am interested in some level of sponsorship: Yes No
Receive Printed Directory Yes (Please add \$5 to your check) No

The discipline through which I am applying for membership renewal is checked below (**choose only one**).
I meet all requirements described for this discipline.

- _____ (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).
- _____ (f) Associate Member - I am a renewing member who has exhibited the ability to bring value to the Council in a manner that is not reflected by the Council’s regular membership.

Date: _____ Signature _____

For more information, contact Matt Ahearn, at 407/428-5152 or mahearn@deanmead.com . Please direct future address changes to our meeting coordinator, Mia Drury at 407/621-6271 or email membership@cfepc.org

PLEASE INCLUDE CHECK FOR \$275 FOR MEMBERSHIP DUES (or \$280 if including Printed Directory)
(PAYABLE TO THE CENTRAL FLORIDA ESTATE PLANNING COUNCIL OR CFEPCC)

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