



*National Association of  
Estate Planners & Councils*

**Membership Application for The Estate Planning Council of the Emerald Coast, Inc.**

1. Name and Professional Title: \_\_\_\_\_  
Office Address: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
\_\_\_\_\_ Cell Phone: \_\_\_\_\_  
E-mail Addresses: \_\_\_\_\_

2. I have been a resident of \_\_\_ Okaloosa \_\_\_ Walton \_\_\_ Bay \_\_\_ Gulf County for \_\_\_ years.

3. I have been actively engaged in Estate Planning for \_\_\_ years.

4. I am a member in good standing of the following state/local professional organization(s):

- \_\_\_\_\_ Bar Association  
\_\_\_\_\_ Institute of Accountants and am a Certified Public Accountant  
\_\_\_\_\_ Chapter of Chartered Life Underwriters (CLUs)  
\_\_\_\_\_ Chapter of Chartered Financial Consultants (ChFCs)  
\_\_\_\_\_ Chapter of Certified Financial Planners (CFPs)  
\_\_\_\_\_ N/A (May only be checked if you are applying for Associate Member Status)

5. a) I have been admitted to practice law in \_\_\_\_\_ for \_\_\_ years.

b) I have practiced accounting as a \_\_\_ Principal \_\_\_ Partner \_\_\_ Member of the Tax Department of an accounting firm in \_\_\_\_\_ for \_\_\_ years.

c) I have been a life underwriter for \_\_\_ years. I am a/an \_\_\_ Agent \_\_\_ Manager \_\_\_ General Agent of the \_\_\_\_\_ Company.

d) I am a/an \_\_\_\_\_ of the \_\_\_\_\_.  
(Title) (Bank or Trust Company)

e) I am a/an \_\_\_\_\_ of the \_\_\_\_\_.  
(Title: Registered Principal or sponsorship) (Financial Institution or Brokerage Firm)

f) I am a/an \_\_\_\_\_ of the \_\_\_\_\_.  
(Title: Officer or Director of Development) (Charitable Organization or Foundation)

f) Other: \_\_\_\_\_ of the \_\_\_\_\_.  
(Title) (Company)

6. Statement as to estate planning experience and ways in which applicant can contribute to the Council. (You may use back of form or attach statement.)

7. I am applying for membership as:

\_\_\_\_\_ A Professional Member and have enclosed a check in the amount of \$250.00

\_\_\_\_\_ An Associate Member and have enclosed a check in the amount of \$200.00

to cover my membership dues for the year 2\_\_\_\_.

\_\_\_\_\_  
(Signature of Applicant)

Date: \_\_\_\_\_