Greensboro Estate Planning Council Membership Application 2025-2026

Current (renewing) members and new member and at-large applicants, please complete the appropriate sections below. Then, mail this form and a check for $150.00 payable to "Greensboro Estate Planning Council, Inc." to our Treasurer (Chris Genheimer, Carruthers & Roth, P.A., 235 N Edgeworth St, Greensboro, NC 27401). For questions, email Chris at cwg@crlaw.com.

Current (Renewing) Members

- Member Name and Organization: ____________________
- Note any changes that should be made to your profile information within our directory at https://www.greensboroepc.org/members/directory and/or your name tag:
    - ____________________
- Any interest in participating on the Board as Board positions come open? ____________

New Member Applicants

- Type of Membership
    - Full membership. My responsibilities are directly related to the field of estate planning as a:
        - ◻ An Attorney licensed to practice in North Carolina
        - ◻ A Certified Public Accountant licensed in North Carolina
        - ◻ A Credentialed Financial Professional (CLU, ChFC or CFP®)
        - ◻ Employed in a Bank Trust Department or Trust Company
    - At-large membership (applying without one of the designations above)
        - ◻ At-Large Membership is open to professionals (other than NC attorneys, NC CPAs, CLUs, ChFCs, CFP®s, or employees of trust companies or bank trust departments) whose responsibilities are directly related to the field of estate planning. Please explain your estate planning experience.
            - ____________________
        - ◻ Complete entire application and obtain signature of Greensboro Estate Planning Council, Inc. sponsoring members. If you have not identified sponsoring members, please complete and submit the rest of the application with a note that you need assistance identifying sponsoring member(s).
            - Sponsoring member signature/date (same professional classification):
                - ____________________
            - Sponsoring member signature/date (different professional classification):
                - ____________________
            - Applicant signature/date:
                - ____________________
        - ◻ Note: Once the completed application is submitted, the Board of Directors of

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GEPC will have the final determination whether the applicant's work is directly related to the field of estate planning.

- ☐ Do not submit check with your application. Completed applications are reviewed throughout the year by the Board. The completed application should be submitted as soon as possible to ensure adequate review time prior to the next meeting. You will be contacted by a Board member regarding their decision

- Profile Information
  - Full Name: ____________________
  - Designation(s) (CPA, CTFA, ChFC, CFP®, etc.): ____________________
  - JobTitle: ____________________
  - Years of Service in Your Profession: ______
  - Business Name: ____________________
  - Address: ____________________
  - Phone: ____________________
  - Email: ____________________
  - Website: ____________________
  - Name You Want on Your Name Tag: ____________________

Interested in Sponsoring a Meeting This Year?

The GEPC is made up of Attorneys, CPAs, credentialed financial professionals (who have either a CLU, ChFC or CFP® designation), bank trust officers & wealth management advisors; and at large members whose responsibilities directly relate to the field of estate planning.

We traditionally meet on the second or third Wednesday in September, November, January, March and May, from 5:30-7:30p.m. at Greensboro Country Club.

The purpose of the Greensboro Estate Planning Council is to promote:

1. the interests of our members in all aspects of Estate Planning, through programming
2. networking among the members through attendance at the bi-monthly membership meetings
3. the exchange of ideas and perspectives among the members.

For a $500.00 fee, your firm or company will receive the following benefits, by being a sponsor of one of our five Membership Meetings::

1. Promotion of your firm in our meeting announcement for the upcoming meeting. These notices are sent out 30 days in advance of each of the meetings. Please supply us with a description of your firm's services in 2-3 sentences. This will be published in the meeting announcement.
2. Your representatives are introduced at the beginning of the meeting that you sponsor, and the opportunity to give a 5-minute info-commercial about your firm or company.
3. The opportunity for two of your representatives to attend our meeting, and network during the social hour that follows the program from 6:30-7:30p.m.