

Greensboro Estate Planning Council, Inc.

**Membership Renewal Form
For Current Members**

For 2018 – 2019

In order to renew your membership for the 2018-2019 Membership Fiscal Year, please complete this form and mail it with your check in the amount of **\$125.00** made payable to “**Greensboro Estate Planning Council, Inc.**” to our Treasurer at the following address:

J. Aaron Bennett, Esq.
Carruthers & Roth, P.A.
235 N. Edgeworth St.
Greensboro, NC 27401
jab@crlaw.com

Member Information (Please print clearly – will be entered on the GEPC website)

First Name: _____

Middle Name: _____

Last Name: _____

Designation (s): _____
(Attorney, CPA, CTFA, ChFC, CFP, etc.)

Business Name: _____

Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Current Discipline(s): *Please “x”. If you have more than one, please indicate primary and secondary*

____ Attorney ____ CPA ____ Trust Officer ____ Financial Service Professional

____ Other

Date

Signature of Applicant

Name You Want on Your Name Tag: _____

GREENSBORO ESTATE PLANNING COUNCIL, INC.
2018-2019 NEW MEMBER APPLICATION for Attorney, CPA, Credentialed Financial Professional, or Employee of Bank Trust Dept. or Trust Company)

New Member Information (Please print clearly – will be entered on the GEPC website)

First Name: _____ Middle Name: _____

Last Name: _____

Designation (s): _____ (CPA, CTFA, ChFC, etc.)

Business Name: _____

Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Name You Want on Your Name Tag: _____

I hereby apply for membership. I qualify for membership as (check appropriate item):

- a. _____ An Attorney licensed to practice in North Carolina
- b. _____ A Certified Public Accountant licensed in North Carolina
- c. _____ A Credentialed Financial Professional (CLU, ChFC or CFP)
- d. _____ Employed in a Bank Trust Department or Trust Company

Date

Signature of Applicant

Recommended by (must be signed by two GEPC members as indicated below):

Date

Estate Planning Council Member of **same** professional classification

Date

Estate Planning Council Member of **different** professional classification

The Annual Membership fee is \$125.00. Please make your check payable to the Greensboro Estate Planning Council, Inc. Please mail this form with your check to:

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GREENSBORO ESTATE PLANNING COUNCIL, INC.

**2018-2019 NEW MEMBER APPLICATION
FOR AT-LARGE MEMBERSHIP**

Please Print Clearly

First Name: _____ Middle Name: _____ Last Name: _____

Business Name: _____

Address: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Professional Designation/Job Description: _____

Years of Service in Your Profession: _____

At-Large Membership is open to professionals (other than NC attorneys, NC CPAs, CLUs, ChFCs, CFPs, 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: _____

(Once the completed application is submitted, the Board of Directors of GEPC will have the final determination whether the applicant's work is **directly** related to the field of estate planning.)

Date

Signature of Applicant

Recommended by:

Date

Estate Planning Council Member and Designation

Date

Estate Planning Council Member and Designation

* 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).

* 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.

Please mail or email this completed application to the Greensboro Estate Planning Council Treasurer:

J. Aaron Bennett, Esq.
Carruthers & Roth, P.A.
235 N. Edgeworth St.
Greensboro, NC 27401
jab@crlaw.com