

# DALLAS ESTATE PLANNING COUNCIL

P.O. Box 38553, Dallas, TX 75238 Phone: 214-340-8020  
E-Mail: [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) Website: [www.dallasepc.org](http://www.dallasepc.org)

## 2023-2024 **INDIVIDUAL** MEMBERSHIP ENROLLMENT FORM (June 1, 2023-May 31, 2024 – *Dues are Non-Transferable and Not Pro-Rated*)

FOR NEW MEMBERS: To pay by credit card, please submit the completed printed membership form via email to [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) and then go to the website, click on the drop-down menu "membership" and then "member renewal".

Name \_\_\_\_\_

Firm Name \_\_\_\_\_

Firm Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

E-mail \_\_\_\_\_ (*please print clearly*)

NOTE: Email address is required for communication purposes

NEW MEMBER: I was referred by \_\_\_\_\_

Discipline you **CURRENTLY PRACTICE:**  
**(CHOOSE ONLY ONE)**

Designations (*check all that apply*):

\_\_\_ Attorney Bar Card No. \_\_\_\_\_

\_\_\_ JD

\_\_\_ AEP

\_\_\_ Certified Public Accountant

\_\_\_ CPA

\_\_\_ CAP

\_\_\_ Financial Planner (check CFP or ChFC)

**(MUST be CFP or ChFC)**

\_\_\_ CFP

\_\_\_ ChFC

\_\_\_ Life Insurance (check CLU or Finseca)

\_\_\_ CLU

\_\_\_ Finseca Member

**(MUST be Chartered Life Underwriter or Finseca member)**

\_\_\_ Trust Management

\_\_\_ CTFA

\_\_\_ Associated Professionals: Designation: \_\_\_\_\_

Years of Experience in **CURRENT** discipline: \_\_\_ Less than 5 \_\_\_ 5-10 \_\_\_ 10-20 \_\_\_ 20+

**Check all that apply:**

Annual Dues (REQUIRED for returning members)

\_\_\_ \$95

(DOES NOT INCLUDE PROGRAM/MEAL COST FOR MEETINGS)

Dues for NEW MEMBERS ONLY (**Prorated to May 31, 2024**)

\_\_\_ \$45

(Note: New Membership year will begin June 1, 2024)

**TOTAL ENCLOSED**

\$\_\_\_\_\_

Please complete this enrollment form, include your check (or pay by credit card online after submitting form to [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com)) for the appropriate amount and mail to the Dallas Estate Planning Council, P. O. Box 38553, Dallas, TX 75238.

For more info on Patron Fee, go to [www.dallasepc.org](http://www.dallasepc.org), click on "About Us", scroll to "Patron".

If your organization is interested in sponsoring a meeting or social event please go to [www.dallasepc.org](http://www.dallasepc.org), click on "About Us", scroll down to "Sponsor" and read the sponsor information. Please contact Teresa Moore, Executive Director, [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) if you would like to sponsor.

NAEPC: To receive additional email communications from NAEPC (2-3 webinars, 4-6 conference, 1 per quarter Journal, plus NAEPC news) opt-in: [http://www.naepc.org/about/contact/mailling\\_list](http://www.naepc.org/about/contact/mailling_list)