

ESTATE PLANNING COUNCIL OF MIDDLE TENNESSEE
APPLICATION FOR MEMBERSHIP
2023-2024

The purpose of the Estate Planning Council of Middle Tennessee is to promote the common business interests of its members via education, networking and collaboration among the various professions of its membership. As such, in person attendance is encouraged, although zoom is available.

By signing below, I understand that I must meet the criteria described below. If approved for membership, I will pay the annual dues, make every effort to attend meetings and remain a member in good standing. If an attorney, I understand that CE and CLE credits, if available, will not be submitted on my behalf unless I have paid my annual dues, timely signed into the relevant meeting and provided my BPR# on this application. If my address or firm affiliation changes, or I move out of town, I will notify *Debbie Norris* at the contact listed below.

Applicant's Printed Name

Applicant's Signature

Date

DESIGNATIONS: Please check all that apply:

Accountant (CPA)

Attorney, BPR #: _____ (BPR must be included on this form to be eligible for CLE)

Life Insurance Professional. -Designations: (CLU, ChFC, LUTCF) _____

CFP®

Trust Officer. -Designations: _____

Non- Profit Development Officer

Other (please provide detail) _____

CONTACT INFORMATION:

Name: _____

Firm: _____

Street Address: _____

City, State, Zip: _____

Phone No: _____

Fax: _____

E-Mail: _____

Third Party E-Mail: _____

REFERENCES: Name and Signatures of two (2) references who must be *active* dues-paying members of the Estate Planning Council of Middle Tennessee. Please attach a recommendation letter from one (1) of these members.

Name: _____ Company _____ Phone: _____

Signature: _____

Name: _____ Company _____ Phone: _____

Signature: _____

Please send:

1. Completed form,
2. The recommendation letter, and
3. Payment in the form of a check payable to the EPC of Middle TN in the amount of \$150, which includes the \$130 annual dues and the \$20.00 initiation fee, to:

Estate Planning Council
Attn: Debbie Norris
Carr, Riggs and Ingram CPA and Advisors LLC
3011 Armory Drive, Suite 300
Nashville, TN 37204

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You will be notified on the status of your application within 30 days of receipt.