ESTATE PLANNING COUNCIL OF MIDDLE TENNESSEE
APPLICATION FOR MEMBERSHIP
2024-2025

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 in person and remain a member in good standing. If an attorney, I understand that CLE credits, if available, will not be submitted on my behalf unless I have paid my annual dues, attended the entire 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, and will update the website.

_____	_____	_____
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:_____

REFERENCES: Name and *Signatures* of two (2) references who must be *active* dues-paying members of the Estate Planning Council of Middle Tennessee. 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

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