

Estate Planning Council of Portland, Inc.

Application for Membership Sponsor and Endorsers

Application of _____

To be approved for membership, an applicant must be recommended by one sponsor and four endorsers who are current members of the Council and who have personal knowledge of the applicant's professional status and estate planning experience. The collective group of the sponsors and endorsers must represent existing members from at least two of the professional membership categories (chartered Life underwriters (CLU) certified financial planners or chartered financial consultants (CFP®/ChFC®); trust officers and other officials of Oregon or Washington banks or trust companies (Trust); certified public accountants licensed by the States of Oregon or Washington (CPA); and attorneys admitted to practice in the States of Oregon or Washington (Attorney) and at least three different employment firms. Please complete the following:

SPONSOR: _____
Professional Category _____
Company _____
Address _____
City/State/Zip _____
Phone _____

ENDORSER: _____
Professional Category _____
Company _____
Address _____
City/State/Zip _____
Phone _____

ENDORSER: _____
Professional Category _____
Company _____
Address _____
City/State/Zip _____
Phone _____

ENDORSER: _____
Professional Category _____
Company _____
Address _____
City/State/Zip _____
Phone _____

ENDORSER: _____
Professional Category _____
Company _____
Address _____
City/State/Zip _____
Phone _____

Estate Planning Council of Portland, Inc.

Application for Membership Estate Planning Experience

1. Describe in general the areas of your practice that include estates and trusts, and the approximate percentage of your total practice that each estate planning area represents; such as "drafting documents," "preparing estate tax returns," or "administering trusts."

<u>Estate Planning Area</u>	<u>Percent of Total Practice</u>
_____	_____
_____	_____
_____	_____
_____	_____
<u>Non-Estate Planning Areas</u>	_____
Total Practice	<u>100%</u>

2. Describe with some specificity (but no names) three trust or estate planning situations with which you have recently been involved. Include enough information to apprise us of the nature and breadth of your estate planning experience. Use attached sheets if desired.

a)

b)

c)

3. Five years of continuous Estate Planning experience is required after receiving the professional designation. Please describe and reference the continuous experience that meets this qualification.