

Thank you for your interest in The Estate Planning Council of Portland. The Council has the following membership categories:

- Chartered Life Underwriters (CLU);
- Certified Financial Planners (CFP®);
- Chartered Financial Consultants (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);
- Attorneys admitted to practice in the States of Oregon or Washington (Attorney);
- Associate Members; and
- Emeritus Members.

Associate Members. Associate Membership in the Council shall be open to affiliated estate planning professionals (not including para-professionals), such as planned giving or development officers, business valuation consultants, fiduciaries, and family investment advisors. Applicants for Associate Membership need not have a professional designation, but must demonstrate continuous estate planning experience of five years (immediately prior to application in the case of an applicant) and ongoing active involvement in estate planning. Associate Membership is also open to members of a Professional Membership Discipline who are not eligible for Professional Membership because of the maximum membership limitations or are working toward but have not yet received the appropriate professional designation. Associate Members shall have all the rights and privileges of Professional Members but may not vote or serve on the Board of Directors.

Emeritus Members. By the affirmative vote of a majority of the members of the Board of Directors, a Professional or Associate Member who meets any one of the following criteria may be elected, upon the members' request to the Board of Directors, to the category of Emeritus Member:

- The member is at least 65 years of age and an active member of the Council for the immediately preceding 10 years; or
- The member is fully and completely retired regardless of age and has been an active member of the Council for the immediately preceding 10 years; or
- In the discretion of the Board.

Emeritus Members shall have all the rights and privileges of Professional Members but may not vote or serve on the Board of Directors. Emeritus Members are exempt from paying dues.

Membership Application Process. Please complete the membership application and send to Melanie Lewis at 111 S.W. Fifth Avenue, Suite 3675, Portland, Oregon 97204. Melanie will contact your sponsor and endorsers and request them to complete and return recommendation forms. Once Melanie receives all the recommendation forms your application will be presented to the board of directors at the next meeting. If you have any questions regarding the process, please contact Melanie Lewis at 503-416-6153 or [melanie.lewis@thede-culpepper.com](mailto:melanie.lewis@thede-culpepper.com).