Estate Planning Council of Portland

Estate Planning Council of Portland, Inc.
Membership Information

Thank you for your interest in joining The Estate Planning Council of Portland, Inc., the premier professional organization for all members of the estate planning community in the Portland area. In addition to engaging with a network of your peers, membership in the Estate Planning Council of Portland offers high quality continuing education through mini-seminars and our main event the annual estate planning seminar. Your membership also includes an array of complimentary or discounted pricing on products and services offered through our affiliation with the National Association of Estate Planning Councils.

Annual membership dues include:

- Complimentary registration for the four mini-seminars
- Complimentary registration of the annual dinner meeting
- Reduced registration fees for the Annual Seminar

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
- Pathway Associate Members
- Lateral Members
- Emeritus Members

For more information, please email info@epcportland.org

Estate Planning Council of Portland, Inc.

Application for Membership

1. Name

2. Professional Discipline:

☐ Attorney ☐ Trust/CTFA ☐ CLU; CFP; ChFC ☐ CPA ☐ Associate* ☐ Pathway Associate* ☐ Lateral**

Date of Designation:

Attorney CTFA CLU CFP ChFC CPA

3. Company / Firm:

4. Business Address:

No. and Street or P.O. Box

City State ZIP

5. Contacts: Business Phone: Fax:

Home Phone: Email:

6. Occupation / Position:

7. Length of time associated with Company / Firm:

8. If associated with present Company / Firm for less than five years, prior Companies / Firms associated with during this period:

9. Please list the most recent four professional development training courses which you have attended relating to estate planning, e.g., CLU, AICPA, CLE, etc.

Course:	Sponsor:	Date:
Course:	Sponsor:	Date:
Course:	Sponsor:	Date:
Course:	Sponsor:	Date:

Signature of Applicant

Date

MAIL APPLICATION TO:

Melanie Lewis
111 S.W. Fifth Avenue, Suite 3675
Portland, Oregon 97204
melanie.lewis@thede-culpepper.com

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

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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."

Estate Planning Area	Percent of Total Practice
Non-Estate Planning Areas	
Total Practice	**100%**

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.

* Associate Members and Pathway Associate Members. Associate Membership in the Council shall be open to an affiliated estate planning professional (not including para-professionals), such as a planned giving or development officer holding the Certified Specialist in Planned Giving (CSPG) designation, a business valuations consultant holding the (MA) Accredited Senior Appraiser (ASA), or a Chartered Financial Analyst (CFA) designation, and an investment advisor with a CTFA, JD, or CPA designation and who meets all other criteria, including ongoing active involvement in estate planning as a substantial share of the applicant's practice for at least five years (immediately prior to application). Associate Membership is also open to a member of a Professional Membership Discipline who is not eligible for Professional Membership because of (i) the maximum membership limitation provided in Section 3.K., below, or (ii) he or she is working toward, but has not yet received, the appropriate professional designation but has had ongoing active involvement in estate planning as a substantial share of the applicant's practice for at least five (5) years, or (iii) he or she has received the appropriate professional designation and has engaged in continuous estate planning practice for at least two years immediately prior to application for Membership in any one or more of the Professional Membership Disciplines, but has not satisfied the five year requirement set forth in paragraph E.(2) above. Applicants who qualify under the preceding sections (i) through (iii) shall be referred to as Pathway Associate Members. Pathway Associate Membership shall be granted to any applicant who meets the criteria set forth in any of sections (i) through (iii) above, and the applicant for Pathway Associate Membership must be recommended by one sponsor and a minimum of two endorsers who are current members of the Council and who have personal knowledge of the applicant's professional status and estate planning experience. Associate Members and Pathway Associate Members shall have all the rights and privileges of Professional Members, but may not vote or serve on the Board of Directors. A Pathway Associate Member who qualifies under section (ii) or (iii) above shall have three years from admission to the Council to acquire his/her appropriate professional designation (in the case of section (ii) above) or to satisfy the five (5) year requirement (in the case of section (iii) above) and to apply for admission as a Professional Member. In the event such Pathway Associate Member does not qualify for Professional Membership within such three (3) year period, then such Pathway Associate Member's membership shall terminate. With respect to any Pathway Associate Member whose admission as a Professional Member is denied because of the maximum membership limitations provided in Section 3.K., below, in the event the number of Professional Members drops below the maximums set forth in paragraph 3.K. below, such Pathway Associate Member shall be entitled to reapply for Professional Membership. Such application shall be given first priority by the Council over other applicants in such membership category for review by the Board of Directors.

** Lateral Membership. Lateral Membership shall be available to any person who would otherwise qualify for admission as a Professional Member or Associate Member and who is actively involved as a member in good standing of another Estate Planning Council, but cannot provide the four endorsements required under Section E.(5) above. A Lateral Member shall be eligible for application upon the recommendation of one sponsor, and upon providing written evidence to the Council of (i) such applicant's continuous experience in an applicable Professional Membership Discipline for five years and (ii) evidence of membership in good standing in another Estate Planning Council. Upon satisfaction of such criteria, such applicant shall enjoy all the benefits of a Professional or Associate Member, as the case may be.