Estate Planning Council of Portland, Inc.
Application for Membership (Name)
Sponsor Recommendation

1. How long have you known the Applicant or worked with the Applicant on estate planning matters? If you have not worked directly with the Applicant on estate planning matters, in what capacity have you known the Applicant?

2. In what areas of estate planning have you personally worked with or have personal knowledge about the Applicant?

3. Please provide one or two specific examples or cases or similar example of business activities (with some specificity, but no names) in which you have been involved with the Applicant or had conversations about related to estate or trust planning or administration.

4. Additional Comments

Yes, I do recommend this individual for membership.

Signed: Date: