

**APPLICATION AND RENEWAL FORM - FOR MEMBERSHIP
ESTATE PLANNING COUNCIL OF THE LEHIGH VALLEY**

APPLICANT (print) _____ OFFICE PHONE _____

EMPLOYER/BUSINESS NAME _____ OFFICE FAX _____

BUSINESS ADDRESS _____

HOME ADDRESS _____ HOME PHONE _____

YEARS ENGAGED IN ESTATE PLANNING WORK _____ (2 years minimum required) EMAIL _____

___ NEW ___ RENEWAL (Sponsor's Signature Not Required)

1. I hereby apply for membership/renewal in the Estate Planning Council of the Lehigh Valley under the following **category** as set forth in the Council By-Laws: (Please note that you must have a professional certification listed in part 2 for the category in which you are applying for, applicants not eligible under those designations may be eligible as an associate member.)

- A. ___ Insurance / Financial Advisor
- B. ___ Trust Officer
- C. ___ Attorney
- D. ___ Accountant
- E. ___ Planned Giving and Development Professionals
- F. ___ Associate
An Associate Member must be sponsored by two members from categories A through E. ___ Yes

2. I hereby certify that I meet the requirements for membership in the above selected category by having attained the following professional certification(s) or degree(s) and that I am in good standing with the governing board or organization that monitors maintaining said certification or degree:

- | | |
|---------------------------------------|--------------------------------------|
| ___ Chartered Life Underwriter | ___ Juris Doctor |
| ___ Chartered Financial Consultant | ___ Master of Laws |
| ___ Certified Financial Planner | ___ Certified Public Accountant |
| ___ Certified Trust Financial Advisor | ___ Certified Fund Raising Executive |
| ___ Bachelor of Laws | ___ Accredited Estate Planner |

I state that I have read ARTICLES II AND III of the By-Laws printed on the reverse side of this application, and that I qualify for membership thereunder.

Signature of Applicant

Date

Please select one if you have a Committee Interest: ___ Membership Committee ___ Program Committee ___ Sponsorship Committee

Sponsor: I have reviewed this application for membership and state that this application meets the qualifications for membership as stated in ARTICLE III of the By-Laws.

Signature of Sponsor

Date

Sponsor Print Name

Sponsor's Category (A through E)

Signature of 2nd Sponsor (Associate Membership only)

Date

Sponsor Print Name

Sponsor's Category (A through E)

**Annual Dues: \$175.00 - Online payments accepted for renewals only: www.epclehighvalley.org
Includes Four Programs (Membership Year runs from June 1st – May 31st)**

Payable to: Estate Planning Council of the Lehigh Valley
Mail to: P.O. Box 21076
Lehigh Valley, PA 18002-1076

ARTICLE II: OBJECTIVES

The objectives of the Council shall be:

1. To advocate and assist in the spreading of knowledge and accurate information pertaining to the various phases and problems having to do with effective and efficient Estate Planning.
2. To foster intelligent cooperation and a cordial understanding of the proper relationship and function among professionals within Categories A thru F, as defined in these Bylaws, and any other party or parties having to do with any Estate Planning job.
3. To establish and promulgate among the Members, as well as among non-Members wherever feasible and practical, the proper ethical standards in dealing with one another, with mutual clients, and with the public.
4. To help the Members to render the highest type of service to clients and customers, knowing that the true measure of such service is always to be gauged from the standpoint of the best interest of the client and his beneficiaries, in terms of today, tomorrow and down through the years.
5. To do any and all of those honorable things that will aid and improve the important task of careful and proper estate planning work.
6. To have unlimited powers to engage in and do any lawful act concerning any or all lawful business for which nonprofit corporations may be incorporated under the Pennsylvania Nonprofit Corporations Law of 1988, as amended; however, subject to the provisions contained in Paragraphs 7 and 8 below.
7. No part of the net earnings of the Council shall inure to the benefit of any Director of the Council, Officer of the Council, Member of the Council or any private individual (except that reasonable compensation may be paid for services rendered to or for the Council affecting one or more of its purposes), and no Director or Officer of the Council, or any private individual shall be entitled to share in the distribution of any of the Council assets upon dissolution of the Council. No substantial part of the activities of the Council shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Council shall not participate in, or intervene in (including the publication or distribution of statements) any political campaign on behalf of any candidate for public office.
8. Notwithstanding any other provision of the Articles of Incorporation, the Council shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from taxation under Section 501(c)(6) of the Internal Revenue Code and its Regulations as they now exist or as they may hereafter be amended.
9. Upon dissolution of the Council or the winding up of its affairs, the assets of the Council shall be distributed to the National Association of Estate Planning Councils, or such other nonprofit organization or organizations having purposes comparable to those of this Council and are exempt from federal income tax under Section 501(c)(6) of the Internal Revenue Code and its Regulations as they now exist or as they may hereafter be amended.

ARTICLE III: MEMBERSHIP

The Council shall not discriminate on the basis of age, disability, race, creed, color, gender, sexual orientation or other prohibited criteria as these terms are defined under applicable state or federal law.

The Membership of the Council shall consist of persons who have been actively engaged in estate planning work for the past two years, who maintain a professional certification(s) and / or degree(s) associated with the following Categories, and are in good standing with the Board or Organization that monitors maintaining said certification and / or degree:

- A. Insurance/Financial Advisor
- B. Trust Officer
- C. Attorney
- D. Accountant
- E. Planned Giving or Development Professional

The Membership of the Council shall also include professionals for whom Membership under Categories A through E is not applicable, and who, as part of their regular business activities, are engaged in estate related activities for a minimum of two years. Such Members shall be known as Associate Members under Category F. An Associate Member must be sponsored by two Members from Categories A through E.

Each proposed Member shall be sponsored by a current Member of the Estate Planning Council of the Lehigh Valley, except as otherwise provided for Membership under Category F for an Associate Member (who requires sponsorship by two current Members who are not themselves Associate Members).

Any person who has been approved as a Member of the Council shall be eligible to renew his or her Membership without sponsorship. Each renewal application shall be reviewed by the Membership Committee to ensure that the objectives of the Council are continually met.

The term of Membership shall be from June 1st through May 31st.