



401 Edgewater Place, Suite 600 , Wakefield, MA 01880 (781) 876-8881
Fax (781) 623-3099 - E - mail: bepc@bepc.org - Website: www.bepc.org

2017/2018 Membership Renewal

\$295

Step one, please complete your membership profile information...

Date: _____

Name: _____
Last, First, Middle Initial

Company: _____

Address : _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

Website: _____

I have been actively engaged in estate planning for _____ years.

Step two, select your membership category...

I am renewing my membership in the Boston Estate Planning Council as:

☐ **A Full Member and affirm that my occupation is directly involved in estate planning.**

Full membership at the time of application requires at least one of the following criteria, please check all that apply:

- ☐ Attorney (JD)
- ☐ CPA (Certified Public Accountant)
- ☐ CLU (Chartered Life Underwriter)
- ☐ CFP® (Certified Financial Planner)
- ☐ ChFC (Chartered Financial Consultant)
- ☐ PFS (Personal Financial Specialist)
- ☐ AEP (Accredited Estate Planner)
- ☐ CFA (Chartered Financial Analyst)
- ☐ CAP (Chartered Advisor in Philanthropy)
- ☐ CTFA (Certified Trust and Financial Advisor)
- ☐ Officer of a Trust Company
- ☐ Masters degree in Finance, Tax, Accounting or other Business

☐ **An Associate Member and affirm that my occupation is directly involved in estate planning.** I do not hold the required degrees and/or credentials listed above.

☐ **An Emeritus Member.** I am a 20 year FULL member in good standing and have reached age 70.

☐ **A Junior Associate Member.** I have attached a copy or verification of my University/College enrollment or letter of intent.

Step three, select your practice area...

Upon renewing for BEPC membership, each member may select only ONE Practice Area that best describes his/her area of concentration in estate planning. Full and Associate Member memberships only.

- *Practice Areas:
- | | |
|--|--|
| ☐ Trust Administration | ☐ Supporting Consultant |
| ☐ Trusts & Estates Law | (Please choose one of the areas below) |
| ☐ (practicing attorney in a law firm) | ☐ Valuation Expert |
| ☐ Life Insurance | ☐ Risk Management |
| ☐ Wealth Management | ☐ Family Dynamics |
| ☐ Planned Giving | |
| ☐ Accounting | |
| ☐ Financial Planning | |

Step four, submit your annual membership dues payment...

☐ I would like to renew my annual dues at \$295.

☐ I would like to renew my Junior Associate membership at \$147.50

We accept Discover, Visa, MasterCard, American Express or Check.
Checks should be made payable to: BEPC

Please enclose proper payment and return to:
Boston Estate Planning Council, 401 Edgewater Place, Suite 600, Wakefield, MA 01880

Please note: In accordance with the Payment Card Industry Security Standards, if paying by credit card, payment can only be accepted by fax or mail. Fax to 781-623-3099. Credit Card payment sent via email will not be processed.

Card type: _____

Credit card number: _____

CVV number: _____

Authorized signature: _____

Expiration date: _____

I hereby renew my membership in the Boston Estate Planning Council and agree to conform to the provisions of its Articles of Association. The information I have presented in the application is true and accurate.

Signature: _____

**The BEPC Membership Renewal process
DOES NOT require you to submit letters of recommendation.**

If you have any questions, please contact the BEPC Membership Services Department at bepc@bepc.org or please call 781-876-8881