



Criteria for BEPC Membership

Full Member:

Any Officer of a Bank or Trust Company, Attorney, CPA, CLU, CFP®, ChFC, PFS, AEP®, CFA, CAP, CTFA, or the holder of a Masters or more advanced degree in Business, Finance, Tax, or Accounting who is significantly engaged in estate planning and/or wealth management activities and has significant contact with an individual estate and/or wealth planning client.

Membership is subject to the recommendation of the Membership Committee and vote of the Board of Directors.

The following documentation is required to complete your application:

1. Professional Bio or Resume
2. One reference from a Full Member inside of your chosen practice area*
3. One reference from a Full Member outside of your chosen practice area*

Associate Member:

Any other person whose occupation is directly involved in estate planning but who does not meet the requirements for Full Membership shall be eligible for Associate Membership in the Council, subject to the recommendation of the Membership Committee and vote of the Board of Directors.

Associate Members, upon five (5) active years of membership in the Council, shall be eligible for Full Membership upon application, recommendation of the Membership Committee, and by a vote of the Board of Directors.

Associate Members shall not be eligible to vote, sponsor new members or hold office.

The following documentation is required to complete your application:

1. Professional Bio or Resume
2. One reference from a Full Member from inside or outside of your chosen practice area*

Junior Associate Members:

Any person pursuing a degree or designation that qualifies for full membership as defined above, (or any person who in the discretion of the Board of Directors may be deemed eligible), and is transitioning into or within the field of estate planning and/or wealth management and does not currently meet the requirements for membership as an Associate Member or Full Member, shall be eligible for Junior Associate Membership. Membership is subject to the recommendation of the Membership Committee and vote of the Board of Directors.

To be eligible for membership renewal each year, Junior Associate Members must certify that they do not meet the requirements for membership as an Associate Member or Full Member, and that they have attended at least one networking event and at least one educational event in the past year. *Junior Associate Members may maintain this membership status for a maximum of five (5) years, and thereafter must qualify for membership as an Associate or Full Member.*

Junior Associate Members shall not be eligible to vote, sponsor new members, or hold office.

The following documentation is required to complete your application:

1. Copy or verification of University/College enrollment other documentation supporting membership eligibility
Or
 2. Personal statement of intent
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*Please note: Reference letters are no longer needed. All we require is the name of the BEPC member, which can be provided on the application. Please provide the full names of the BEPC members for your references and we will reach out to them directly. Once the responses are received from your references, your application will be complete.

If you'd like the Membership Committee to help connect you with members who can provide references, please contact us at bepc@bepc.org, and we'll make the necessary introductions.

Once your application is complete, it will be presented to the Board for a vote, which happens once a month.