NEW MEMBER APPLICATION

4 Lan Drive, Suite 310, Westford, MA 01886 (978) 364-5170
Fax (978) 250-1117 - E - mail: bepc@bepc.org - Website: www.bepc.org

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.

☐ **REQUIRED:** I have attached a Professional Biography or Resume.

Step two, select your membership category...

I am applying for 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:

____ JD (Attorney)

____ 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.

☐ **A Junior Associate Member.** I have attached a copy or verification include a copy or verification of University/ College enrollment or other documentation supporting membership eligibility .

Need some help? Boston Estate Planning Council Headquarters is ready to help you with your questions, please call 978-364-5170

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Step three, verify your involvement...

This applies to *Full and Associate* new member applications only. The BEPC by-laws require significant involvement in estate planning and/or wealth management professionals, and significant contact with individual estate planning and/or wealth management clients. The following is a 2-3 sentence statement describing how I meet these requirements in my profession.

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Step four, select your practice area...

Upon applying 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

____ Trusts & Estates Law (practicing attorney in a law firm)

____ Life Insurance

____ Wealth Management

____ Accounting

____ Financial Planning

____ Family Office Management

____ Planned Giving

____ Supporting Consultant: (Please choose one of the areas below)

- ____Valuation Expert
- ____ Risk Management
- ____ Family Dynamics

Step five, complete your reference requirements...

This applies to *Full and Associate* new member applications only. The application for FULL membership must include the reference of Two (2) Full Members, one from the *Practice Area** of the applicant and one from a different *Practice Area**. The application for ASSOCIATE membership must include the reference to One (1) Full Member. Only one reference in support of membership may be from a Member with the same employer as that of the applicant. An exception to the requirement of a reference from the Practice Area of the applicant shall be made whenever there are ten (10) or fewer Full Members of that Practice Area. In that event, the application must bear the reference of two (2) Full Members, one (1) each from two different Practice Areas.

Reference One : ______________________________ Reference Two: ______________________________
Email or Phone: ______________________________ Email or Phone: ______________________________

Step six, submit your annual membership dues payment of $325...

We accept Visa, MasterCard, American Express or Check. Checks should be made payable to: **Boston Estate Planning Council**

JUNIOR ASSOCIATE Membership Annual Dues: $177.50

Please enclose proper payment and return to:

Boston Estate Planning Council, 4 Lan Drive, Suite 310, Westford, MA 01886

P/(978) 364-5170 F/(978) 250-1117

Check One: Visa MasterCard American Express Discover Security Code:__________________

Credit card number:______________________________

Authorized signature:______________________________

Expiration date:______________________________

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

Signature: ______________________________

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BEPC BOSTON ESTATE PLANNING COUNCIL

Who We Are...

The Boston Estate Planning Council is a multi-disciplinary association organized to provide educational programs and networking opportunities for estate planning professionals. The Council is comprised of nearly 830+ members who meet to get to know and respect each other through an increased awareness and understanding of the views, concerns and valuable interaction of their overlapping specialties.

Our History...

The Council, the first in the United States, was established as the “Boston Life Insurance and Trust Council” in 1930. In 1960 the name was changed to the “Boston Estate and Business Planning Council”, and the membership base was widened to admit, along with insurance and trust representatives, attorneys-at-law and certified public accountants who were practicing in the estate and business planning field. The Boston Estate Planning Council took historical steps in May of 2008 and embraced clearly defined criteria to attract new members, retain our current members and give this highly sophisticated estate planning professional organization a platform to move into the 21st Century. The BEPC has expanded the membership criteria to reflect the practice dynamics of today’s estate planning environment. We have increased the number of degrees and/or credentials that will allow professionals, directly involved in estate planning, FULL membership in The Council.

Membership Categories:

Full Member

Upon application and acceptance, any Officer of a Trust Company, Attorney, CPA, CLU, CFP®, ChFC, PFS, AEP, CFA, CAP, CTFA, or the holder of a Masters Degree in Business, Finance, Tax, or Accounting ***who is directly involved in estate planning*** *may become a Full Member of the Council, subject to the recommendation of the Membership Committee and vote of the Board of Directors. The application for membership must bear the reference of two (2) Full Members, one from the practice area of the applicant and one from a different practice area as determined from time to time by the Board of Directors. Only one reference in support of membership may be from a Member with the same employer as that of the applicant. An exception to the requirement of a reference from the Practice Area of the applicant shall be made whenever there are ten (10) or fewer Full Members of that Practice Area. In that event, the application must bear the reference of two (2) Full Members, one (1) each from two different Practice Areas. A FULL Member shall have the privilege to vote, sponsor new members, and hold office.*

Associate Member

Applicants ***whose occupation is directly involved in estate planning but do not have the required degrees and/or credentials*** *shall be eligible for Associate Membership in the Council upon terms and conditions as set forth by the Board of Directors. The application for membership must bear the reference of one (1) Full Member, one from the practice area of the applicant. An exception to the requirement of a reference from the Practice Area of the applicant shall be made whenever there are ten (10) or fewer Full Members of that Practice Area. In that event, the application must bear the reference of one (1) Full Member from a different practice area. Associate members cannot vote, sponsor new members or hold office. 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 a two-third (2/3) vote of the Board of Directors.*

Emeritus Member

The Boston Estate Planning Council offers Emeritus Membership status to FULL members of the Boston Estate Planning Council in good standing who have reached their twenty (20) year membership anniversary and age seventy. Individuals may request Emeritus Membership Status by a written letter to the Board of Directors; recommendation by the Membership Committee and election to membership by the Board of Directors at any quarterly Board meeting. Emeritus members cannot vote, sponsor new members or hold office. Emeritus Members may attend all Brown Bags Seminars, Roundtable Breakfasts & Networking Events at no charge and do not pay annual dues. BEPC Emeritus member may attend the educational events and the Annual Estate Planner of the Year Dinner at the member price per event and registration is required.

Junior Associate Member

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. 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.* Individuals may become Junior Associate Members of the Council upon completed application, to include a copy or verification of University/College enrollment or other documentation supporting membership eligibility, including but not limited to a personal statement of intent; payment of dues; written recommendation by the Membership Committee, and election to membership by vote of the Board of Directors. *Junior Associate members DO NOT require letters of recommendation. Junior Associate members cannot vote, sponsor new members or hold office.*