

**MEMBERSHIP APPLICATION  
ESTATE PLANNING COUNCIL OF LAKE COUNTY**

1. Name: \_\_\_\_\_  
Office Address: \_\_\_\_\_  
Office Tel: \_\_\_\_\_ Fax: \_\_\_\_\_  
Home Address: \_\_\_\_\_  
Home Tel: \_\_\_\_\_ Fax: \_\_\_\_\_  
E-mail: \_\_\_\_\_

2. I have been a resident of \_\_\_\_\_  
for \_\_\_\_\_ years. (City) (County)

3. I have been actively engaged in Estate Planning for \_\_\_\_\_ years.

4. I am a member in good standing of the:

- \_\_\_\_\_ (a) \_\_\_\_\_ Bar Association
- \_\_\_\_\_ (b) \_\_\_\_\_ Institute of Accountants, and am a C.P.A.
- \_\_\_\_\_ (c) \_\_\_\_\_ Life Underwriters Association
- \_\_\_\_\_ (c) \_\_\_\_\_ Chapter of Chartered Life Underwriters
- \_\_\_\_\_ (d) \_\_\_\_\_ International Board of Standards & Practices  
for Certified Financial Planners

5. (a) I have been admitted to practice law in \_\_\_\_\_  
for \_\_\_\_\_ years.

(b) I have practiced accounting as a (Principal), (Partner), (Member of the Tax Dept.  
of \_\_\_\_\_ accounting  
firm) in \_\_\_\_\_ for \_\_\_\_\_ years.

(c) I have been a Life Underwriter for \_\_\_\_\_ years.  
I am an (Agent). (General Agent) of the \_\_\_\_\_ Co.  
I received my Chartered Life Underwriter designation in the year \_\_\_\_\_.

(d) I am a \_\_\_\_\_ of the \_\_\_\_\_.  
(Title) (Bank or Trust Company)

(e) I have been a Certified Financial Planner for \_\_\_\_\_ years.

(f) I am a Charitable Giving \_\_\_\_\_ for \_\_\_\_\_.  
(Organization)

6. Statement as to estate planning experience and ways in which applicant can contribute to  
Council: **(Use back or attach statement.)**

Recommended by:

X \_\_\_\_\_

Name: \_\_\_\_\_

X \_\_\_\_\_

Name: \_\_\_\_\_

X \_\_\_\_\_  
Signature of Applicant

(\*One of the recommending members  
must be of the same profession as  
the applicant.)