



**Estate Planning Council
of Rochester**
54 Woodline Drive
Penfield, NY 14526
Phone: 585-260-6663
Email: connect@epcrochester.org

**EPC Rochester Membership
Application for 2023-2024**

- New Member
- Prior Member Re-Applying

Professional Designations _____

Applicant Name _____

Telephone _____

Company _____

Year of Birth _____

Address _____

City/State/Zip _____

E-Mail _____

Applicant Must Have Completed the Above Section and Meet the Following Qualifications:

- The membership of the Council shall consist of all members in good standing. Consideration shall be given to applicants for membership who attest on the membership application that they are: (a) presently actively engaged in the field of estate planning or estate administration with at least three years' experience in this area, (b) in one or more of the professional categories of members listed below, (c) and who have always been in good standing with, and who meet all of the ethical requirements of, their respective profession (s), and (d) not currently suspended (or who have not been previously removed) by the governing body or bodies overseeing any of the professional categories of members listed below to which they now belong or to which they may have belonged in the past.
- Applicant must be sponsored by two Council members: one sponsor must be from the same discipline as applicant and one must be from a cross-discipline.
- Signature of sponsors required on application as well as Trust Department or T&E Administrator signatures.
- Applicant must be further qualified under one of the following sections: (Check Applicable Section)

Bank Trust Officer An applicant shall be a trust officer or a fiduciary officer of a bank or trust company who is engaged in the management and administration of trusts and or estates, or fiduciary governance and management of the fiduciary practice and is recommended for membership by a senior officer of the Trust Department who is a member of the Estate Planning Council of Rochester.

Attorney An applicant shall be an admitted attorney in New York State who either: (1) is engaged, in substantial part, in the field of estate planning or estate administration, or (2) is employed with a local Surrogate's Court.

Chartered Life Underwriter An applicant shall be a Chartered Life Underwriter who is continuously licensed in accordance with the policies of The American College of Financial Services and who is engaged, in substantial part, in the field of estate planning or estate administration.

Chartered Financial Consultant An applicant shall be a Chartered Financial Consultant who is continuously licensed in accordance with the policies of The American College of Financial Services, and who is engaged, in substantial part, in the field of estate planning or estate administration.

Accountant An applicant shall be a Certified Public Accountant who is engaged, in substantial part, in the field of estate planning or estate administration.

Certified Financial Planner An applicant shall be a Certified Financial Planner who is continuously licensed in accordance with the policies of the Certified Financial Planner Board of Standards, Inc., and who is engaged, in substantial part, in the field of estate planning or estate administration.

Affiliate Applicant is an estate planning professional with more than three years of experience and a certification in a field other than those listed above. Indicate professional certification _____

New Professional Applicant is an individual who would otherwise qualify for membership, but is lacking the 3 years of experience. Indicate professional category from list above _____ Indicate years of experience _____

Student Indicate field of study _____

Describe current status as student and expected graduation/completion date _____

Applicant meets all qualifications as set forth on this application. _____

Signature- Senior Officer, Trust Department

Applicant meets all qualifications as set forth on this application. _____

EPC will verify with NYS Unified Court System

EPC will verify with American College of Financial Services

EPC will verify with American College of Financial Services

EPC will verify with NYSED

EPC will verify with CFP Board

Briefly describe your role, how it relates to estate planning, and reasons for joining the Estate Planning Council:

I understand that, if approved, my continued membership in the Estate Planning Council of Rochester is contingent upon my continuing qualification according to Sponsors to the terms under which I joined, **plus my attendance at no less than two program meetings a year**, and timely payment of dues. I hereby agree to notify the Council at such time as I may no longer qualify.

Signature of Applicant _____ Date _____

The undersigned sponsors are current members of the Council, personally know the applicant, confirm that the applicant meets all of the above qualifications, and recommend that the applicant be admitted into membership.

Print or Type Sponsor Name _____ Signature _____
Phone _____ Date _____

Registered Discipline (Same as Applicant) Please circle BTO ESQ CLU CPA CFP ChFC

Print or Type Sponsor Name _____ Signature _____
Phone _____ Date _____

Registered Discipline (Different than Applicant) Please circle BTO ESQ CLU CPA CFP ChFC

Council Use Only Date Received: _____ Date Approved: _____ Date Admitted: _____ Reviewed by: _____ Declined: _____

