

TACOMA ESTATE PLANNING COUNCIL

Application for Membership

Name:	
Organization:	
Business Address:	
Telephone / Fax	
E-Mail	

1) Attorneys:

- a) I am a member in good standing of the _____ Bar Association. I was admitted to practice in Washington in 19____.
- b) I **am/am not** (circle one) admitted to practice before the Tax Court.
- c) I am a **partner / principal / employee** of _____ (firm).

2) Accountants:

- a) I am a member in good standing of the _____ Chapter of the _____ Society of CPAs. I have practiced accounting for _____ years.
- b) I am / am not (circle one) enrolled to practice before the Treasury Department.
- c) I am a **partner / principal / employee** of _____ (firm).

3) Life Underwriters:

- a) I am a member in good standing of the _____ (local professional association).
- b) I have been a Life Underwriter for _____ years. I was designated C.L.U. in 19____.
- c) I am an agent / general agent / manager (circle one) for _____ (company).

4) Trust Officers:

- a) I am a Trust Officer at _____ and have been for _____ years.

5) Other (Candidates for "At-Large" Membership):

- a) I am a _____, and I am not an accountant or an insurance agent.
- b) I have the following professional designation(s): _____.

I have been actively engaged in estate planning for _____ years. Please describe your experience / interest briefly, and share any other comments you wish:

Recommended By:

Signed:

1. _____
TEPC Member

_____ *Applicant*

2. _____
TEPC Member