



HAMPTON ROADS ESTATE PLANNING COUNCIL

An Association of Practicing Attorneys, Certified Public Accountants, Chartered Life Underwriters, Non-profit Executives, Trust Officers and Other Qualified Licensed Professionals

NEW MEMBERSHIP APPLICATION

Membership dues are \$225 per person.

Business Affiliation:

- Attorney Chartered Life Underwriter
- CPA Non-Profit Professional
- Trust Officer Other Licensee

Membership Type:

- Associate Membership *(for those with less than three (3) years experience in Estate Planning)*
- Emeritus Membership *(for HREPC members who have retired)*
- Financial Planning

(See next page for current Articles of Association and Bylaws, Section 3, Membership, for required professional credentials. You may learn more by visiting our website www.HREPC.org.)

Candidate's name: _____

Preferred name for badge: _____

Title / Designation(s): _____

Company: _____

Address: _____

City: _____ Zip code: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Certifications and Professional Memberships: _____

Estate Planning Experience: (Number of years, activities per Section 3, Paragraph 3.03, prior employers, nature of experience): _____

Other Members of Hampton Roads Estate Planning Council with whom you have worked or are acquainted: _____

Sponsor's Signature: _____ Date: _____

Credentials reviewed: _____

Chairman, Membership Committee

Approved by vote of Executive Committee: Yes No Date: _____

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3. MEMBERSHIP

3.03 Membership in the Council shall be restricted to those who devote a significant portion of their occupational or professional time and effort to performing research and/or rendering advice for the purpose of assisting clients or customers in the accumulation of wealth, avoidance of unnecessary taxes on such estates, planning the disposition and transfer of, postmortem planning and administration of estates, charitable planning or planned giving and who are actively engaged in one or more of the following occupations:

- a) Attorneys-at-Law, who are licensed and admitted to practice before the highest court of the state by which licensed;
- b) Certified Public Accountants, who hold a current license;
- c) Trust Officers, employed by bank trust departments and independent trust companies;
- d) Chartered Life Underwriters, who hold a current license.
- e) Full time employees of recognized tax-exempt organizations, whose primary occupation or job responsibility is the advising of actual and potential donors to such organizations of charitable or planned giving options, including, but not limited to the income, gift and estate tax consequences of such options;
- f) Other licensed or accredited professionals who, in the discretion of the Executive Committee, have the education, training, experience and qualities necessary for Membership, including but not limited to:
 - 1) Certified Financial Planners
 - 2) Chartered Financial Consultants

And who are actively engaged for three (3) years or more in one or more of the following activities:

- Administering estates and trusts
- Analyzing existing life insurance coverage for continuing relevance
- Analyzing proposed transactions for estate and gift tax implications
- Attending estate planning council meetings and other estate planning educational events
- Business succession planning
- Charitable/gifting planning
- Designing estate plans
- Designing qualified and non-qualified retirement plans
- Developing strategies to minimize potential estate and gift taxed
- Developing programs to conserve assets during lifetime and at death
- Drafting estate planning documents
- Life settlements of life insurance policies
- Preparing estate and gift tax returns
- Preparing fiduciary accountings
- Preparing fiduciary income tax returns
- Probating wills & administering estates
- Proposing life insurance solutions consistent with estate plans
- Retirement distribution planning
- Succession planning

3.04.1 No new members shall be elected by the Executive Committee if such election would cause an occupational category to constitute more than forty percent (40%) of the total membership of the Council. No member in good standing shall be expelled if attrition by members of other professions causes any profession to exceed the above stated limitation on membership.