2011/2012 BEPC NEW MEMBER APPLICATION

P.O. Box 500 - Hingham - MA - 02043-0500 - Telephone (617) 266-1919
Fax (617) 266-6849 - E - mail: bepc@bepc.org - Website: www.bepc.org

BEPC
Boston Estate Planning Council

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 statement describing my experience and professional activities in Estate Planning.

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:

____ Attorney (JD)
____ 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.

☐ **An Emeritus Member.** I am a 20 year FULL member in good standing and have reached age 70.

☐ **A Student Member.** I have attached a copy or verification of my University/College enrollment.

Step three, 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. This applies to Full and Associate Member renewals only.

*Practice Areas:
____ Trust Administration
____ Trusts & Estates Law (practicing attorney in a law firm)
____ Life Insurance
____ Wealth Management
____ Planned Giving
____ Accounting
____ Financial Planning
____ Family Office Management

Step four, complete your sponsorship requirements...

This applies to *Full and Associate* new member applications only. The application for membership must include the recommendation of two Full Members, one from the *Practice Area** of the applicant and one from a different *Practice Area**. Only one recommendation 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 recommendation 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 recommendation of two (2) Full Members, one (1) each from two different Practice Areas.

Step five, submit your annual membership dues payment of $275...

We accept Visa, MasterCard, American Express or Check. Checks should be made payable to: BEPC

EMERITUS membership is at NO CHARGE, STUDENT Membership is at 1/2 Annual Dues

Please enclose proper payment and return to:

Boston Estate Planning Council, P.O. Box 500, Hingham, Mass. 02043

P/617.266.1919 F/617.266.6849

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: ____

Need some help? Boston Estate Planning Council Headquarters is ready to help you with your questions, please call 617.266.1919

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BEPC
Boston Estate Planning Council

The Boston Estate Planning Council
Membership Application & Guidelines

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 recommendation of two 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 recommendation 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 recommendation 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 recommendation 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 recommendation of two 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 recommendation 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 recommendation 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 recommendation of two (2) Full Members, one (1) each from two different Practice Areas. 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.

Student Member

The Boston Estate Planning Council offers Student Membership to full time students. Student Members are eligible for a 50% membership fee reduction for a maximum of 2 years. At the end of year two, Student Members will be required to reapply as Full or Associate Members under those defined guidelines. Individuals may become a Student Member of the Council upon completed application to include a copy or verification of University/College enrollment; payment of dues and; recommendation by the Membership Committee and election to membership by the Board of Directors at any quarterly board meeting. Student members DO NOT require letters of recommendation. Student members cannot vote, sponsor new members or hold office.