

THE CONNECTICUT ESTATE AND TAX PLANNING COUNCIL, INC.

MEMBERSHIP APPLICATION

I, _____ hereby apply for membership in THE CONNECTICUT ESTATE AND TAX PLANNING COUNCIL INC. and agree, on the approval and acceptance of this application, to abide by the ARTICLES OF ASSOCIATION, rules, traditions and CODE of ETHICS that now exist or that may be enacted.

The Council specifically requests that the following provisions be strictly followed:

“The use of mailing list (or membership booklet) be prohibited for any purposes other than OFFICIAL COUNCIL business and under no circumstances shall it be given to a third party without prior consent from the BOARD OF DIRECTORS.”

FIELD OF SPECIALIZATION:

- I am an Officer of a Trust Company or Bank maintaining a Trust Department
- I am a Chartered Life Underwriter (CLU) or Chartered Financial Consultant (ChFC)
- I am an Attorney
- I am Certified Public Accountant
- I am a Certified Financial Planner
- I am Certified Trust and Financial Advisor
- I am an individual who works in the trust, banking, life insurance, legal, accounting, financial services, or planned giving field. (Circle one)

(Candidate must qualify as a member in at least one of the above areas)

Length of time in specialized field: _____

Experience: (chronological listing of Firms/Companies which you have been associated with and functions performed)

FIRM NAME: _____

ADDRESS: _____

TELEPHONE: _____ FAX _____

Title or Position _____ EMAIL _____

Dated: _____ Signature: _____

****This application must be accompanied by \$150.00 payment of annual dues**

We, the undersigned, endorse this application: (must be current members of the Council and must sign/print their names)

Signed: _____ **Signed:** _____

Name: _____ **Name:** _____

ABOVE APPLICATION APPROVED BY THE BOARD OF DIRECTORS THIS _____ DAY OF _____ 20_____

Secretary

NOTE: When this application has been completed, both by the applicant and the endorsers, please forward it to the following Address for approval by the Board of Directors:

**Joan Hemperly
Executive Director
Connecticut Estate & Tax Planning Council, Inc.
419 Downs Road
Bethany, CT 06524
203 393 2267
cetpc@snet.net**

Any questions regarding this application should be referred to the above address.

Optional:

Organizations you have addressed:

Some of the more important By-Laws read as follows:

II OBJECT

The objects of the Council shall be:

1. To provide a better understanding among the professions of the services which lawyers, chartered life underwriters, trust officers, certified public accountants, and financial advisors render.
2. To promote cooperation among the members of these professions and to foster a better understanding of the proper relationship which each profession bears to the other, to their clients and to the general public.
3. To provide a medium for the discussion of topics of common interest.

III MEMBERSHIP

The Membership of the Council shall consist of those who were members as of the effective date of these By-Laws and the following who have had at least one (1) years of experience in estate and tax planning, and who are actively engaged in trust or estate counseling or administration or tax planning, who are recommended by at least two (2) members of the Council, and have been approved for membership by the Board of Directors.

1. Individuals who are officers of Trust Companies or banks maintaining Trust Departments;
2. Chartered Life Underwriters(CLU) or Chartered Financial Consultants (ChFC) or Certified Financial Planner (CFP);
3. Attorneys;
4. Certified Public Accountants;
5. Certified Trust and Financial Advisors;
6. Other individuals who work in the trust, banking, life insurance, legal, accounting, financial services, or planned giving fields.

Membership may include honorary members. The Board of Directors by a majority vote may elect a member or other person as an honorary member when in its judgement such membership will faithfully serve the purpose of the Council and its best interests. No dues will be required of an honorary member, and such membership shall not have voting privileges. The name of each honorary member shall be identified as such on the membership list.