



BEVERLY HILLS ESTATE PLANNING COUNCIL

Attached, please find a membership application to the Beverly Hills Estate Planning Council (BHEPC). Our Mission is to enhance the proficiency of professional advisors who are active in estate planning and who are committed to professional growth through education and cooperation.

Interested candidates must attend at least one and no more than two monthly meetings as a guest sponsored by an existing member, before submitting an application. The information on the application must be verifiable. Sponsorship by a member in good standing is necessary.

Membership dues are \$440.00 per year (October to June, except April); a \$15 discount is applied for payment by check or cash. For applications received after February 1st, membership dues will be prorated. Payment is due upon the approval of your application by the Board of Directors.

Annual membership dues include eight dinner meetings, which are generally held on the first Monday of each month, October through June, except April. Professional/Social exchange begins at 6:00 p.m., and dinner is served at 6:30 p.m., and the informational “tidbit” presentations and speakers’ presentations are from 7:00 — 8:30 p.m. Each meeting features a speaker on issues of importance to estate planning advisors.

Memberships are issued based on an applicant’s estate planning experience: “Estate planning” includes planning for clients’ physical and financial well-being during their lifetimes, providing for the disposition of their assets following their deaths, administering trusts and estates and assisting clients with tax issues that arise in these contexts. Memberships will be issued to advisors who devote a substantial amount of their time to estate planning and related activities, who have done so for at least five years and who are credentialed in their profession.

Members enjoy all privileges of monthly meetings, continuing education credit (if available), invitations to special events, networking opportunities, posting on the organization’s website, the opportunity to introduce and/or sponsor other candidates for membership and the opportunity to serve as a director or officer.

For further information about membership, or if you have questions about the attached form, please contact **Sarah M. Lewis, BHEPC Secretary**, at (310) 461-1431 or via email at sarah@aequitaswm.com.

BEVERLY HILLS ESTATE PLANNING COUNCIL

Contact: Sarah M. Lewis, Secretary
Telephone: (310) 461-1431; Fax (310) 341.2325
Email: sarah@aequitaswm.com

APPLICATION FOR MEMBERSHIP

Name: _____

Address: _____

Phone number: _____ Fax Number: _____

E-mail Address: _____

Firm or Company Name: _____

Title: _____

Profession: (please choose one)

Attorney: _____ CPA: _____

Insurance: _____ Investment Advisor: _____

Appraiser: _____ Elder Care: _____

Trust Officer: _____ Planned Giving: _____

Financial Planner: _____ Fiduciary: _____

(Other) Describe: _____

How Long in this Profession? How long at Current Firm/Company? _____

Prior Experience Pertinent to Estate Planning? _____ Please describe: _____

Undergraduate Degree: _____ Year Obtained: _____

Postgraduate Degree: _____ Year Obtained: _____

Professional Certification or Credentials: _____

How much of your time is devoted to estate planning, estate or trust administration work: ____ %

Duties typically performed and for whom: _____

Reasons for wanting to become a member: _____

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Contact: Sarah M. Lewis, Secretary
 Telephone: (310) 461-1431; Fax (310) 341.2325
 Email: sarah@aequitaswm.com

APPLICATION FOR MEMBERSHIP (page 2)

Community/Charitable Activities:

If you have made professional presentations and/or written for publication, please include here:

<u>Publications:</u>	Title	Publisher	Year
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

<u>Speeches/Presentations:</u>	Title	Sponsor/Event	Year
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

The above information is true to the best of my knowledge:

Applicant Signature	Date
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Sponsored by the following two members of the Beverly Hills Estate Planning Council:

Sponsor Name	Sponsor Name
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Dues will be collected upon approval of application by the BHEPC Board of Directors.
 Dues for membership are **\$440.00 per year (\$425 if paid by check or cash.)**.
 [If joining between February 1 and June 30, the dues are prorated at _____.]

 This section for BHEPC use only:

Application Approved: _____ Dues to collect: _____ Date: _____

Please e-mail your completed application to Sarah M. Lewis, Secretary, sarah@aequitaswm.com.
 If you have any questions, please call me at (310) 461-1431.