

**CONEJO VALLEY ESTATE PLANNING COUNCIL
APPLICATION FOR MEMBERSHIP**

MISSION STATEMENT

The Mission of the *Conejo Valley Estate Planning Council* is to promote the highest quality estate planning services – by developing and improving the capabilities of Council members, fostering cooperation among its professional disciplines, and familiarizing the public with estate planning matters.

APPLICATION PROCESS

This application will be considered complete when:

- Signed by the Applicant; *and*
- Signed by two sponsors who are current members of the *Conejo Valley Estate Planning Council*; *and*
- Submitted with a \$375 check payable to “*Conejo Valley Estate Planning Council*” for first year’s dues.

Submission of a check with the application does *not* constitute acceptance as a member. The completed application will be reviewed by the Council’s Membership Chair and/or Membership Committee. Next, the Applicant will be interviewed by a member of the Board of Directors, who will report to the other Directors. Finally, the applicant’s name and application will be submitted to the entire Council for further consideration and input from current Members. The Board of Directors will then act upon the application. Preference for membership is given to applicants with five or more years of experience in estate planning.

APPLICANT INFORMATION AND QUALIFICATIONS

Name _____

Firm _____

State Bar/License/Association/Certification Number _____

Business Address _____

Phone(s) _____

Fax _____ Email _____

In addition to the other membership requirements set forth in the Bylaws, the Applicant must have a professional interest in estate planning and be a member in good standing of one of the following groups:

- Attorney
- Certified Public Accountant
- Chartered Life Underwriter
- Trust Officer
- Certified Financial Planner
- Special Interest Member [a director, officer, manager or its equivalent of a business or organization that performs estate related services such as (a) trust and estate administration, (b) wealth management, or (c) planned giving]

APPLICANT INFORMATION AND QUALIFICATIONS (cont.)

1. The membership category, which most accurately matches my area of practice, is: *(circle one)*

- | | | | | | |
|--------------------|-----------------------------------|----------------------------------|---------------|-----------------------------------|---|
| Attorney at
Law | Certified
Public
Accountant | Chartered
Life
Underwriter | Trust Officer | Certified
Financial
Planner | Estate
Planning
Special
Interest |
|--------------------|-----------------------------------|----------------------------------|---------------|-----------------------------------|---|

2. I hold at least one of the following certifications or degrees: *(circle all that apply)*

- JD CPA CLU CTFA CFP Other _____

3. My primary business location is in the following California County: *(circle one)*

- | | | |
|-------------------|-------------------------|-----------------------|
| Ventura
County | Santa Barbara
County | Los Angeles
County |
|-------------------|-------------------------|-----------------------|

4. How long have you been working in your current discipline? _____ years

5. Tell us about your estate planning experience:

- a. When did you begin working in estate planning? _____
- b. Have you worked continuously in estate planning since that time? _____
- c. If not, please explain. _____

- d. What percentage of your professional time is spent in estate planning? _____%

6. Describe your experience in the estate planning field and explain why this experience qualifies you for membership in this organization.

7. Describe your purpose(s) for joining the *Conejo Valley Estate Planning Council*.

APPLICANT INFORMATION AND QUALIFICATIONS (cont.)

8. Education (degree, school, year)

Undergraduate Degree: _____

Advanced Degree(s): _____

9. In addition to your sponsors, please list any other references you would like to provide.

10. Please provide any other information that you think would be helpful as we evaluate your application.

SIGNATURE & ATTESTATION

I hereby apply for membership in the *Conejo Valley Estate Planning Council*.

I attest that the information I have provided in this application (including any supporting documents and other information) is true and correct. I understand that providing false or misleading information is grounds for immediate termination of membership.

I consent to the *Conejo Valley Estate Planning Council* investigating my background, including but not limited to, verifying the information I have provided in this application.

I have read and understand the Bylaws of the *Conejo Valley Estate Planning Council*.

I will not use my membership in any form of advertisement or for solicitation of business. I understand that the *Conejo Valley Estate Planning Council* Membership Roster is confidential and restricted in its usage (with certain exceptions expressly authorized by the Board of Directors).

I understand that my continued membership will depend upon my regular attendance at official meetings (usually held quarterly) of the *Conejo Valley Estate Planning Council*.

I recognize the *Conejo Valley Estate Planning Council's* right to deny membership to any Applicant, without explanation, as it deems appropriate.

Signature

Date

SPONSORSHIP

TO: The Board of Directors of the *Conejo Valley Estate Planning Council*

RE: Membership Application for: _____
(Applicant's name)

Name of Sponsor #1: _____

- I have personally known the applicant for _____ years.
- The applicant [is] [is not] a member of my firm. (*circle one*)
- My professional experience with the applicant in estate planning matters is described below:
(attach more sheets if necessary)

- I am personally acquainted with this applicant. Experience leads me to believe that his/her professional expertise and ethical standards are consistent with those of the *Conejo Valley Estate Planning Council* as set forth in the Bylaws. I believe the applicant will make a meaningful contribution to the Council. As a member in good standing of the Council, I recommend this applicant for membership.

Date: _____

Signature of Sponsor #1

Name of Sponsor #2: _____

- I have personally known the applicant for _____ years.
- The applicant [is] [is not] a member of my firm. (*circle one*)
- My professional experience with the applicant in estate planning matters is described below:
(attach more sheets if necessary)

- I am personally acquainted with this applicant. Experience leads me to believe that his/her professional expertise and ethical standards are consistent with those of the *Conejo Valley Estate Planning Council* as set forth in the Bylaws. I believe the applicant will make a meaningful contribution to the Council. As a member in good standing of the Council, I recommend this applicant for membership.

Date: _____

Signature of Sponsor #2