

THE ESTATE AND BUSINESS PLANNING COUNCIL OF HARTFORD

95 West Street, Rocky Hill, CT 06067
Tel 860-721-7400 Fax 860-721-7406
ebpchartford@att.net www.ebpchartford.org

Application for Membership

This application must be accompanied by a cover letter from the applicant's sponsor, who must be a Council member. Please see the second page for a more detailed description of the application procedure.

Name: _____ Phone: _____
Firm: _____ Fax: _____
Address: _____ Email: _____
Sponsor: _____

| Education: | Name of School | Graduation Date | Degree or major |
|--|----------------|-----------------|-----------------|
| College: | _____ | _____ | _____ |
| Graduate School: | _____ | _____ | _____ |
| Professional Designations (relevant to your occupation): | _____ | | |
| Primary Occupation: | _____ | | |

Circle EBPC Category:

| | |
|--|------------------|
| ATTORNEY | TRUST OFFICER |
| CPA or Enrolled Agent | VALUATION EXPERT |
| CHARITABLE GIFT PLANNERS | |
| FINANCIAL/INSURANCE - CLU/ChFC/CFP/PFS/CFA/P&C INSURANCE/CPCUs | |
| ASSOCIATE MEMBER | |

Occupational Experience:

| Firm | Period of Service | Type of Work |
|-------|-------------------|--------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Date: _____ Signature of Applicant: _____

Procedure

An individual desiring membership in the Council should arrange for a current member of the Council to sponsor the application. The sponsor should obtain an application from the Chair of the Council's Membership Committee. After the applicant completes the application, the sponsor should submit it with a cover letter including the sponsor's recommendation of the applicant.

Qualifications

1. The applicant must be a member of one of the following categories:
 - (a) Attorney;
 - (b) Trust Officer;
 - (c) Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Financial Planner (CFP), Personal Financial Specialist (PFS) or Chartered Financial Analyst (CFA); Chartered Property and Casualty Underwriter; P&C Insurance Professionals/CPCUs
 - (d) Certified Public Accountant (CPA) and Enrolled Agents;
 - (e) Valuation Expert who has any of the following designations: Member of Appraisal Institute (MAI); American Society of Appraisers - Accredited Senior Appraiser (ASA); The Institute of Business Appraisers - Certified Business Appraiser (CBA) or Business Valuator Accredited in Litigation (BVAL); National Association of Certified Valuation Analysts - Certified Valuation Analyst (CVA); Accredited in Business Valuation (ABV) or who has at least five (5) years experience as a valuation expert; or
 - (f) Charitable Gift Planner who has the following designation: Chartered Advisor in Philanthropy (CAP) or who has at least five (5) years experience as a Charitable Gift Planner
2. The applicant must be active in the fields of estate and business planning with a principal place of business, or a majority of their client base, in one of the following towns: Avon, Berlin, Bloomfield, Bolton, Bristol, Burlington, Canton, Cromwell, Durham, East Granby, East Haddam, East Hampton, East Hartford, East Windsor, Ellington, Enfield, Farmington, Glastonbury, Granby, Haddam, Hartford, Hartland, Kensington, Manchester, Marlborough, Middlefield, Middletown, New Britain, Newington, Plainville, Plymouth, Portland, Rockville, Rocky Hill, Simsbury, Somers, South Windsor, Southington, Suffield, Tolland, Vernon, West Hartford, Wethersfield, Windsor and Windsor Locks.

Requirements for Membership

1. Dues in the initial year of membership shall be prorated according to the number of programs left in the year.
2. The applicant's sponsor should either email the completed application to ebpchartford@att.net or mail it to: EBPC Hartford, 95 West Street, Rocky Hill, CT 06067
3. Applications for membership are reviewed and need approval of both the Membership Committee and the Board of Directors. When applications are approved, the applicant will receive a welcome email with a link to pay dues and an invoice sent via email. If the application is not approved, the Membership Committee will follow up with the applicant to let the applicant know what is needed to meet membership requirements.

Associate Membership

An Associate Member is a person (i) who is pursuing a degree or designation in one (1) of the six (6) professions described above, (ii) whose principal place of business is outside the Greater Hartford area, or (iii) who does not have a majority of such person's client-base in the Greater Hartford area may become an Associate member with the approval of the Membership Committee and election by the Board of Directors. Associate Members, upon five (5) active years of membership shall be eligible for regular membership. Associate Members may become eligible for regular membership by job definition, earned degree and/or credential or change in geographic area or client-base.