

Estate and Business Planning Council of Hartford **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
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College: _____

Graduate School: _____

Professional Designations (relevant to your occupation): _____

Primary Occupation: _____

Circle EBPC Category:

ATTORNEY	TRUST OFFICER
CLU/ChFC/CFP/PFS	CPA
VALUATION EXPERT	PLANNED GIVING PROFESSIONAL

Occupational Experience:

Firm	Period of Service	Type of Work
_____	_____	_____
_____	_____	_____

Date: _____

Signature of Applicant: _____

MEMBERSHIP APPLICATION PROCEDURE

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, Chartered Financial Consultant, Certified Financial Planner; or Personal Financial Specialist;
 - (d) Certified Public Accountant;
 - (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 ten (10) years experience as a valuation expert; or
 - (f) Planned Giving Professional who has the following designation: Chartered Advisor in Philanthropy (CAP) or who has at least ten (10) years experience as a planned giving professional.
2. The applicant must be active in the fields of estate and business planning with a principal place of business 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:

Estate and Business Planning Council of Hartford
95 West Street, Rocky Hill, CT 06067
860-721-7400 fax 860-721-7406 ebpchartford@att.net
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 get more information or to let the applicant know what is needed to meet membership requirements.