



Virginia Peninsula Estate Planning Council

An Association of Practicing Attorneys, Certified Public Accountants, Chartered Life Underwriters, Trust Officers and Other Qualified Licensed Professionals

Membership Application

2020/2021 membership dues discounted to \$175 per person

Business Affiliation:

Attorney Chartered Life Underwriter

CPA Non-Profit Professional

Trust Officer Other Licensee

(See next page for current Articles of Association and Bylaws, Section 3, Membership, for required professional credentials. You may learn more by visiting our website: www.Peninsulaep.org)

Membership Type:

Associate Membership (for those with less than three (3) years experience in Estate Planning)

Standard Membership

Emeritus (for retired VPEPC Members)

Candidate's Name: _____

Preferred Name for Badge: _____

Title/Designation(s): _____

Company: _____

Address: _____

City: _____ Zip Code: _____

Phone: _____ Website: _____

Certifications and Professional Memberships: _____

Estate Planning Experience: (Number of years, activities, prior employers, nature of experience): _____

Other Members of Virginia Peninsula Estate Planning Council with whom you have worked or are acquainted: _____

Sponsor's Signature: _____

Approval Process:

The completed Membership Application form along with three (3) letters of recommendation may be submitted electronically or by mail to the Membership Chairperson. All letters must be from individuals who have actually worked with the applicant on estate planning or estate administration. Letters are to be from three different of the six separate categories among: attorney-at-law; certified public account; trust officer; charter life underwriter/charter financial consultant; certified financial planner; or at large (employed in the estate/legacy planning area.) Each applicant is then presented by the Membership Chairperson to the council board for review and approval by a majority vote.

P. O. Box 6221, Williamsburg, VA 23188

Admin@Peninsulaepc.org

3. MEMBERSHIP

Membership Requirements. Membership in the Council shall be restricted to those who devote a significant portion of their occupational or professional time and effort to performing research and/or rendering advice for the purpose of assisting clients or customers in the accumulation of wealth, avoidance of unnecessary taxes on such estates, planning the disposition and transfer of, postmortem planning and administration of estates, charitable planning or planned giving and who are actively engaged in one or more of the following occupations:

1. Attorneys-at-Law, who are licensed and admitted to practice before the highest court of the state by which licensed;
2. Certified Public Accountants, who hold a current license;
3. Trust Officers, employed by bank trust departments and independent trust companies;
4. Chartered Life Underwriters, who hold a current license;
5. Full time employees of recognized tax-exempt organizations, whose primary occupation or job responsibility is the advising of actual and potential donors to such organizations of charitable or planned giving, including, but not limited to the income, gift and estate tax consequences of such options; and
6. Other licensed or accredited professionals who, in the discretion of the Executive Committee, have the education, training, experience and qualities necessary for Membership, including but not limited to: A) Certified Financial Planners, and B) Chartered Financial Consultants.

And who are actively engaged for three (3) years or more in one of the following activities;

1. Administering estate and trusts;
2. Analyzing existing life insurance coverage for continuing relevance;
3. Analyzing proposed transactions for estate and gift tax implications;
4. Attending estate planning council meetings and other estate planning or educational events;
5. Business succession planning;
6. Charitable/gifting planning;
7. Designing estate plans;
8. Designing qualified and non-qualified retirement plans;
9. Developing strategies to minimize potential estate and gift taxes;
10. Developing programs to conserve assets during lifetime and at death;
11. Drafting estate planning documents;
12. Life settlements of life insurance policies;
13. Preparing estate and gift tax returns;
14. Preparing fiduciary accountings;
15. Preparing fiduciary income tax returns;
16. Probating wills & administering estates;
17. Proposing life insurance solutions consistent with estate plans;
18. Retirement distribution planning; and/or
19. Succession planning.

Limit to Occupational Category. No new Member application shall be accepted by the Executive Committee if such acceptance would cause an occupational category to constitute more than forty percent (40%) of the total membership of the Council. No Member in good standing shall be expelled if attrition by Members of other professions causes any profession to exceed the above stated limitation on Membership.