

Knoxville Estate Planning Council

Membership Application

Date of Application _____

Name _____ Designations _____

Company _____

Address

Phone

Fax: _____ E-mail: _____

Professional Affiliation (principal area of practice):

☐ CLU/ChFC/CFP ☐ CPA ☐ Attorney ☐ Trust Officer ☐ Special¹

Sponsors' Names 1. 2.

Sponsors must be current members of KEPC and not from the applicant's place of employment. *Please attach a sponsor form from each sponsor.

*Attach a summary of your educational background and a description of how you are engaged in the practice of estate planning.

List program topics that interest you.

Please enclose a check to KEPC for \$250.00 annual dues when submitting this application.

Return check and application to: Knoxville Estate Planning Council
PO Box 53164
Knoxville, TN 37950

¹ The “Special” category is intended for individuals who are knowledgeable of, actively involved in, and contribute to the field of estate planning in a capacity other than as a CLU/ChFC/CFP, CPA, attorney, or trust officer and who hold a license, certification, or designation related to estate planning that is not covered by the other categories. Historically, this category has been reserved for officers of charitable organizations and IRS agents.