

**East King County Estate Planning Council Membership Application**

Membership in the East King County Estate Planning Council is open to Attorneys, CPAs, CFPs, CFAs, ChFCs, CLUs, Trust Officers, and others for whom estate planning is a significant practice element and who live or work on the Eastside. New members must be in good standing with their professional organization, sponsored by a current member, and be approved by the EKCEPC Board of Directors.

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Seeking Continuing Education Credits from:**

Washington State Bar Association: \_\_\_\_\_ WSBA #: \_\_\_\_\_

Washington State Insurance Commissioner's Office \_\_\_\_\_

Certified Financial Planner Board of Standards \_\_\_\_\_

Washington State Board of Accountancy \_\_\_\_\_

**Professional Designation(s):**

At least one is required. Please indicate below:

CPA \_\_\_\_\_ Attorney \_\_\_\_\_

CFP \_\_\_\_\_ CFA \_\_\_\_\_

ChFC \_\_\_\_\_ CLU \_\_\_\_\_

EAST KING COUNTY ESTATE PLANNING COUNCIL

Trust Officer \_\_\_\_\_

Are you applying as an At-Large Member? Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, please complete the At-Large Membership Addendum.

Sponsoring Member Signature: \_\_\_\_\_  
(required)

Name: \_\_\_\_\_

Sponsoring Member Category: \_\_\_\_\_

Ethics Certification:

I certify that I uphold the highest ethical standards and observe all ethical rules established by the governing body of my profession, and that I have never been investigated, reprimanded, censured, or disciplined for an ethical violation by my profession's governing body.

Signature: \_\_\_\_\_

## East King County Estate Planning Council At-Large Membership Addendum

At-large members consist of persons selected by the Executive Board who represent charitable organizations qualifying under IRC Section 501(c)(3), **or who are otherwise worthy of membership but do not qualify under any of the other groups**. At-large members are non-voting and may not serve on the Executive Board or as Officers.

### Certification Pathway Inquiry

Are you currently working toward one of the professional certifications listed on page one of the Membership Application? Yes \_\_\_\_\_ No \_\_\_\_\_

If YES:

Certification you are pursuing: \_\_\_\_\_

Accrediting organization: \_\_\_\_\_

Steps taken toward certification:

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If NO:

The primary mission of EKCEPC is to provide quality education and networking for those individuals who are engaged in the areas of trust and estate planning. Describe how your current profession, experience, and skills relate to trust and estate planning and/or qualify you for At-Large membership:

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