NOMINATION FOR MEMBERSHIP IN THE ATLANTA ESTATE PLANNING COUNCIL, INC.

To the Secretary of the Atlanta Estate Planning Council, Inc.:
I hereby nominate and sponsor for membership in the Atlanta Estate Planning Council:

Name of Applicant:		
Company/Firm:		
Address:		
City:	**State:**	**Zip:**
Phone:	**Fax:**	
E-mail:		
Class applied for:		

The nominee (1) has the qualifications listed in the Bylaws for membership in the Class for which the nominee is proposed *(see attached summary),* (2) is actively engaged in estate planning or is actively and directly connected with the trust activities of a bank or trust company, and (3) has spent not fewer than five of the immediately preceding eight years actively engaged in estate planning or actively and directly connected with the trust activities of a bank or trust company.

The nominee has spent ____________ years actively engaged in estate planning or actively and directly connected with the trust activities of a bank or trust company.

This nomination application includes:

- ☐ 1. Page one of the membership application, signed by myself as sponsor;
- ☐ 2. Three endorsements, each from members of different membership classes and other than my own membership class (For a total of four signatures, each from different classes); and
- ☐ 3. One endorsement from a current member of the Board of Directors (Membership class not applicable).

In support of the nomination, in addition to this application, attached are

- ☐ 1. The nominee’s resume or curriculum vitae;
- ☐ 2. The nominee’s responses to the preliminary interview questions; and
- ☐ 3. My cover letter of introduction as sponsor setting forth sufficient facts to show that the nominee meets the requirements for membership in the Class for which he or she is applying.

Signature of Sponsor:	**Date:**
Name of Sponsor: *(please print)*	**Class of Sponsor:**

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ENDORSEMENTS OF NOMINATION

We endorse the nomination of ____ for membership in the Atlanta Estate Planning Council, Inc.

Signature of Endorser:	**Date:**
Name of Endorser: *(please print)*	**Class of Endorser:**

Signature of Endorser:	**Date:**
Name of Endorser: *(please print)*	**Class of Endorser:**

Signature of Endorser:	**Date:**
Name of Endorser: *(please print)*	**Class of Endorser:**

Signature of Board Member:	**Date:**
Name of Board Member: *(please print)*	**Class of Board Member: NA**

NOTE: Each endorser must be an active member of a different membership class and may not be of the same membership class as the sponsor.

The membership class of the Board Member is not applicable and need not differ from the endorsers.

The completed package is to be returned to Lynette Rickman at emf@atlantaestateplanningcouncil.com. Once received, a member of the membership committee will call you to ask and/or answer any clarifying questions.

PRELIMINARY INTERVIEW QUESTIONNAIRE FOR APPLICATION TO THE ATLANTA ESTATE PLANNING COUNCIL, INC.

To the applicant: *In addition to providing a copy of your resume or CV, please respond to each of the below questions with as much detail as possible; A member of the Membership Committee will contact you to follow-up once your responses are received. A response of "See attached resume, CV, (etc.)" will not be deemed a response.*

1) **What is the frequency and role of the estate planning process in your typical professional workday?**

2) **Please describe what you hope to get from participating in the AEPC membership, and the contributions you would like to make:**

QUALIFICATIONS FOR MEMBERSHIP IN THE ATLANTA ESTATE PLANNING COUNCIL, INC.

CLASS		QUALIFICATIONS
A	**(Life Insurance Professionals)**	(1) Is employed by an organization whose primary function is the advice, placement, and management of life insurance in the context of business and estate planning. (2) Is then devoting a substantial percentage of his or her time to the advice, placement, and management of life insurance for the purposes of business and estate planning. (3) Has done so for not less than five of the immediately preceding eight years. (4) Holds and successfully maintains any one of the following designations: Chartered Life Underwriter ® (CLU®), Chartered Financial Consultant ® (ChFC®), Master of Science in Financial Services (MSFS), Certified Financial Planner® (CFP®), AEP (Accredited Estate Planner) or is a current member in good standing of the bar of a jurisdiction of the United States.
B	**(Trust Officers)**	(1) Is a trust officer who is an officer of a bank or trust company. (2) Is actively and directly connected with the trust activities of the bank of trust company of which he or she is an officer.
C	**(Attorneys)**	(1) Is a current member in good standing of the bar of a jurisdiction of the United States. (2) Is actively engaged in the private practice of law or employed by a law firm, accounting firm, insurance company, bank or trust company, a company engaged in financial planning or investing, family office, or other similar entity.
D	**(Certified Public Accountants)**	(1) Is a certified public accountant licensed by and in good standing with the state board of accountancy of a jurisdiction of the United States. (2) Is actively engaged in the practice of accounting or employed by a law firm, accounting firm, insurance company, bank or trust company, a company engaged in financial planning or investments, family office, or other similar entity.
E	**(Certified Financial Planner™)**	(1) Holds the CFP certification. (2) Is actively engaged in financial planning or investing or employed by a law firm, accounting firm, insurance company, bank or trust company, a company engaged in financial planning or investments, family office, or other similar entity.
J	**(Affiliated Professional)**	(1) Is not otherwise eligible to be admitted to membership in Class A, B, C, D, E, F, or G (2) Is actively engaged in estate planning (3) Has spent not fewer than five of the immediately preceding eight years engaged in estate planning or actively and directly connected with the trust activities of a bank or trust company (4) May hold one or more of the following designations: Accredited Estate Planners (AEP®); Chartered Financial Analysts (CFA®); Chartered Advisors in Philanthropy (CAP®); Certified Private Wealth Advisors (CPWA®); Valuation Professionals; Insurance/Risk Management Professionals; and Family Office Executives.