

NEW MEMBERSHIP APPLICATION

AKRON TAX AND ESTATE PLANNING COUNCIL

Annual Membership -- \$75.00

Luncheon -- \$35 per luncheon attended

Return this form to Taylor Papiernik at tpapiernik@sequoia-financial.com

Pay your annual membership and ongoing luncheon dues online at: <https://atepc.org/membership/>

I HEREBY APPLY FOR MEMBERSHIP IN THE AKRON TAX AND ESTATE PLANNING COUNCIL

NAME: _____

PROFESSIONAL DEGREES / DESIGNATIONS HELD (check all that apply):

___ Atty ___ CPA ___ CLU® ___ ChFC® ___ AEP® ___ CFA ___ CFP® ___ CTFA ___ CWS® ___ CAP® ___ MSFS

___ Other: _____

WHAT IS YOUR PRIMARY PROFESSIONAL DISCIPLINE? (choose one):

___ Attorney ___ Accountant ___ Trust Officer ___ Insurance Professional ___ Financial Planning Professional ___ Planned Giving Professional

___ Other, please explain: _____

YEARS OF PRACTICE: _____

PRESENT EMPLOYER:

BUSINESS ADDRESS:

BUSINESS CITY, STATE & ZIP CODE: _____

BUSINESS PHONE: _____ **FAX:** _____

E-MAIL: _____

Please include any additional information you feel would be helpful for us to know:

Would you like your profile included on the Akron Tax and Estate Planning Council website: _____

Please indicate if you have any special instructions for correspondence (i.e. staff or team member who should receive correspondence, in lieu of sending directly to you). If so, please indicate this person's contact information.

NAME: _____

E-MAIL: _____

PHONE: _____

Initial Here if you paid dues by credit card online: _____

Recommended to the Council by:

1. _____

2. _____

APPLICANT SIGNATURE: _____

DATE: _____