

The Financial & Estate Planning Council of Huntsville – Membership Application

Name: _____ Telephone: _____

Firm: _____ Fax #: _____

Address: _____ E-Mail: _____

I. I am applying for membership in one or more of the following categories*:

_____ Officer of a Trust Company or Bank maintaining a Trust Department, which is actively engaged in trust or estate operations and administration

_____ Chartered Life Underwriter

_____ Attorney

_____ Certified Public Accountant

_____ CERTIFIED FINANCIAL PLANNER™

_____ Professional offering to the public financial planning services, asset management services, or other related estate planning services

* Please note that the Board of Directors attempts to maintain parity among categories of membership. As such, no new members shall be admitted under a category if that category has 35% or more of the membership.

II. I certify that I meet the qualifications for membership:

_____ I am interested in and actively practicing financial planning, estate planning or related subjects.

_____ **(Full Member)** I have practiced financial planning, estate planning or related subjects for a minimum of 5 years.

_____ **(Associate Non-Voting Member)** I have practiced financial planning, estate planning or related subjects for a time period of between 2 – 5 years.

_____ I am in good standing with all professional organizations with which I am affiliated.

_____ I have been nominated by an active member of the Financial and Estate Planning Council of Huntsville as follows:

Sponsor Name: _____

Sponsor Signature**: _____ Dated: _____

Applicant Signature**: _____ Dated: _____

Instructions: **If this application is sent electronically, an email from the Sponsor and Applicant is sufficient**.

1. Complete application and sign**. Please be sure that your sponsor has signed**.
2. Include a copy of your resume.

Applications may be returned to:

Financial & Estate Planning Council of Huntsville
Secretary / Treasurer
P.O. Box 700
Huntsville, AL 35804-0700