

Woodland Hills Tax & Estate Planning Council

Application for Membership

Mission Statement

The Mission of the Woodland Hills Tax & Estate Planning Council, Inc. is to promote the highest quality estate and tax planning services - by developing and improving the capabilities of Council members.

Application Process

This application will be considered when:

- Signed by the Applicant and submitted with a cover letter on the applicant's letterhead; *and*
- Signed by two sponsors who are current members of the Woodland Hills Tax & Estate Planning Council, Inc.; *and*
- Submitted with a \$450 check payable to "Woodland Hills Tax & Estate Planning Council, Inc." for the first year's dues. (Applicants who join during the course of the Council's fiscal year will receive a prorated invoice for their dues.)

Please submit the application, via mail, fax, or scan/email, to our Membership Chairperson:

Lisa Nelsen

Bank of the West

213-972-0263 phone

402-445-7138 fax

300 So. Grand Avenue

Los Angeles, CA 90071

lisa.nelsen@bankofthewest.com

Submission of a check with the application does *not* constitute acceptance as a member. The completed application will be reviewed by the Council's Membership Chair and/or Membership Committee, who will then report to the other Directors. Upon a thorough review of the application the Board of Directors will then act upon the application.

Application and Qualifications

Name _____

Firm _____

State Bar/License/Association/Certification Number _____

Business Address _____

Phones(s) Office _____ Cell _____

Fax _____ Email _____

In addition to the other membership requirements, the Applicant must have a professional interest in estate and or tax planning and be a member in good standing of one of the following groups:

- Attorney
- Certified Public Accountant and or Enrolled Agent
- Certificated Financial Planner
- Trust Officer
- Chartered Life Underwriter
- Chartered Financial Consultant
- Special Interest Member [a director, officer, manager or its equivalent of a business or organization that performs estate related services such as (a) trust and estate administration. (b) wealth management, or (c) planned giving]

1. The membership category, which most accurately matches my area of practice, is: (*check one*)

- Attorney at Law
- Certified Public Accountant/Enrolled Agent
- Certified Financial Planner
- Trust Officer
- Chartered Life Underwriter
- Chartered Financial Consultant
- Financial Advisor
- Estate Planning Specialist
- Accredited Estate Planner
- Other (*describe*)

2. I hold at least one of the following certifications or degrees: (*circle all that apply*)

JD CPA EA CFP CTFA CLU ChFC Other_____

3. My primary business location is in the following: (*circle one*)

San Fernando Valley Los Angeles County Ventura County

4. How long have you been working in your current discipline? _____ years

5. Tell us about your estate planning experience:

a. When did you begin working in estate planning? _____

b. Have you worked continuously in estate planning since that time? _____

c. If not, please explain _____

d. What percentage of your professional time is spent in estate planning? _____%

6. Describe your experience in the estate planning field and explain why this experience qualifies you for membership in this organization.

7. Describe your purpose(s) for joining the Woodland Hills Tax & Estate Planning Council, Inc..

8. Education (degree, school, year)

Undergraduate Degree: _____

Advanced Degree(s): _____

9. In addition to your sponsors, please list any other references you would like to provide.

10. Please provide any other information that you think would be helpful as we evaluate your application.

Signature & Attestation

I hereby apply for membership in the Woodland Hills Tax & Estate Planning Council, Inc..

I attest that the information I have provided in this application (including any supporting documents and other information) is true and correct. I understand that providing false or misleading information is grounds for immediate termination of membership.

I consent to the Woodland Hills Tax & Estate Planning Council, Inc. investigating my background, including but not limited to, verifying the information I have provided in this application.

I will not use my membership in any form of advertisement or for solicitation of business. I understand that the Woodland Hills Tax & Estate Planning Council, Inc. Membership roster is confidential and restricted in its usage (with certain exceptions expressly authorized by the Board of Directors).

I understand that my continued membership will depend upon my regular attendance at official meetings (usually held monthly) of the Woodland Hills Tax & Estate Planning Council, Inc..

I recognize that the Woodland Hills Tax & Estate Planning Council, Inc. has the right to deny membership to any Applicant, without explanation.

Applicant's Signature

Date

SPONSORSHIP

TO: The Board of Directors of the *Woodland Hills Tax & Estate Planning Council, Inc.*

RE: Membership Application for: _____ (*Applicant's name*)

Name of Sponsor #1: _____

I have personally known the applicant for _____ years.

The applicant [is] [is not] a member of my firm. (*circle one*)

My professional experience with the applicant in estate planning matters is described below:
(*attach more sheets if necessary*)

I am personally acquainted with this applicant. Experience leads me to believe that his/her professional expertise and ethical standards are consistent with those of the *Woodland Hills Tax & Estate Planning Council, Inc.* as set forth in the Bylaws. I believe the applicant will make a meaningful contribution to the Council. As a member in good standing of the Council, I recommend this applicant for membership.

Signature of Sponsor #1 _____

Date: _____

Name of Sponsor #2: _____

I have personally known the applicant for _____ years.

The applicant [is] [is not] a member of my firm. (*circle one*)

My professional experience with the applicant in estate planning matters is described below:
(*attach more sheets if necessary*)

I am personally acquainted with this applicant. Experience leads me to believe that his/her professional expertise and ethical standards are consistent with those of the *Woodland Hills Tax & Estate Planning Council, Inc.* as set forth in the Bylaws. I believe the applicant will make a meaningful contribution to the Council. As a member in good standing of the Council, I recommend this applicant for membership.

Signature of Sponsor #2 _____

Date: _____