ESTATE PLANNING COUNCIL OF INDIANAPOLIS, INC.

APPLICATION FOR MEMBERSHIP 2023-2024

(Please type or print)

Applicant's Name: ______________________________

Firm Name: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Telephone No. ______________ Mobile No. ______________

Email Address: ______________________________

Occupation: ______________________________

Membership Category (select only one): Attorney _____ CPA _____

Insurance ________ Trust Officer _____ Other Individual _____

Please furnish details on your last five years of estate planning activity employment:

From	**To**	**Employer**

Please describe your estate planning activities:

____

____

____

Education:

College/University Attended	Graduated?	Degree Received

Professional Designation(s): ______________________________

What post-graduate estate planning seminars or related courses of study have you completed?

____

____

Approximately what percent of your business or professional activity was spent in estate planning and administration during the past 12 months? ________

Describe your activity:

____

____

Do you meet the qualifications as stated in the guidelines for membership? ___________

Would you be willing to participate in an estate planning program at a council meeting as it relates to your discipline? ______________________________

QUESTIONS TO BE ANSWERED BY SPONSORS

	Sponsor No. 1	Sponsor No. 2
How long have you known the applicant:		
In a professional relationship?	________________	________________
In a personal relationship?	________________	________________
Have you personally worked with the applicant on Estate Planning matters for third parties?	________________	________________

We have in this connection reviewed the membership rules and recommend the applicant for membership in the Estate Planning Council of Indianapolis, Inc.

Sponsor No. 1 Signature Date	Sponsor No. 2 Signature Date
Sponsor No. 1 Printed Name Date	Sponsor No. 2 Printed Name Date

This application must be signed by two members. One sponsor must be from the professional category of the applicant, and the other from a different category. One sponsor must be present at the executive council committee meeting at which the application is considered.

Please mail or email to:
Telephone: 317-258-0728

Email: dsailer@ksmcpa.com

Dan Sailer, CPA/ABV, CFA
Katz, Sapper & Miller, LLP
800 E. 96th Street., Suite 500
Indianapolis, IN 46240

GUIDELINES FOR MEMBERSHIP

The official requirements for membership are controlled by the Bylaws but are summarized below. For all of the professions below, the applicant must have practiced at least five years in the respective profession. However, applicants with less than five years of experience may be admitted for membership if the applicant receives a unanimous vote of the board.

Attorneys should have a basic interest in estate, gift, and income tax law as it is related to the area of estate planning. In addition, a reasonable portion of their professional responsibilities should be in the estate planning field, and also in the area of probate law. Each applicant must be admitted to the Bar in the State of Indiana.

Accountants must be a Certified Public Accountant licensed under the Indiana Public Accountancy Statute. They should be engaged in public practice and have had experience in taking part in the overall area of estate planning.

Insurance and Financial Advisers must have experience in the professional use of life insurance products and similar products in estate planning before being nominated for admission as a Member; (2) holds a bachelor's degree from an accredited college or university; and (3) is a Chartered Life Underwriter (CLU), Chartered Financial Analyst (CFA), Certified Financial Planner (CFP), or Chartered Financial Consultant (ChFC) or has other experience or educational or business qualifications that, in the Board's judgment, demonstrate significant skill in and a commitment to the professional use of life insurance products and similar products in estate planning.

Trust Officers shall include those persons engaged in trust or probate account administration or supporting services or business development for a bank having trust powers. The applicant must hold a bachelor's degree from an accredited college or university.

Other Professionals, or other individuals who do not fall into any of the above professional categories but who satisfy the following two requirements: (1) have a bachelor's degree from an accredited college or university, and (2) have work experience that, in the Board's judgment, includes a reasonable amount of time devoted to estate planning and administration as a part of the estate planning team.