## ESTATE PLANNING COUNCIL OF INDIANAPOLIS, INC. APPLICATION FOR MEMBERSHIP 2021-2022

(Please type or print)

Applicant's Name:					
Firm Name:					
Address:			_		
City, State, Zip:					
Telephone No.	Fax No				
Email Address:					
Occupation:					
Membership Categor	y (select only one):	attorney	CPA		
Insurance	Trust Officer _	Other Individ	lual		
Please furnish details <u>From</u>	on your last five years of To En	estate planning activity n <b>ployer</b>	v employment:		
Please describe your	estate planning activities:				
Education:					
	ersity Attended	Graduated?	Degree Received		
Professional Designa	. ,				
What post-graduate	estate planning seminars o	r related courses of stu	udy have you completed?		
	the past 12 months?	r professional activity v ———	was spent in estate planning and		
Do you meet the qua	lifications as stated in the (	guidelines for members	ship?		
Would you be willing your discipline?	to participate in an estate	planning program at a	a council meeting as it relates to		

## **QUESTIONS TO BE ANSWERED BY SPONSORS**

Spansor No. 1

Spancar No. 2

	<u> </u>	<u> </u>	<u> </u>
How long have you known the applicant: In a professional relationship?			
In a personal relationship?			
Have you personally worked with the app on Estate Planning matters for third parti			
We have in this connection reviewed membership in the Estate Planning Cour		•	e applicant for
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 tw	ro momboro	One energy must be from th	a professional

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, fax or email to: Michael Carson, CFP, CRPS, CIMA

Telephone: 317-550-1833

50 E. 91st Street, Suite 205 Indianapolis, IN 46240

Email: mcarson@hurlowwealth.com

## **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 an 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.

<u>Accountants</u> 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.

<u>Insurance and Financial Advisers</u> 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.

<u>Trust Officers</u> 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.