

# ETPCEC Membership Application

Name

Firm or Affiliation

Office Mailing Address

  

Web Site

Bus Phone

Fax

E-Mail

## Membership Category (Please complete the relevant section)

(a) **Attorney:** I have been admitted to practice law in  for  years.

I am member in good standing of the  Bar Association(s).

(b) **CPA's & Accountants:** I have practiced accounting as a Principal Partner Member of the tax department of an accounting firm in  (city)

(state) for  year(s). I am a member in good standing of the CT Society of CPA's CT Society of Enrolled Agents National Society of Public Accountants or  (other)

I (am  am not ) a CPA. I (am  am not ) an Enrolled Agent.

(c) **Life Insurance Underwriters:** I have been a Life Insurance Underwriter for  years and am an Agent Manager General Agent of the  Company.

I am a member in good standing of the  Life Underwriters Association. I received my Chartered Life Underwriter designation in  (year). I am a member of the American Society of CLU & ChFc  Chapter

(d) **Trust Officers:** I am  (title) of the  (Bank or Trust Co.) and have been an officer of the bank since  (year).

(e) **Probate Judge:** I have been the probate judge for the District of  since  (year).

(f) **Financial Planner:** I am a Registered Investment Advisor Registered Investment Advisor Agent with the following SEC CT RI Other (specify)

I hold the CFP designation: ( Yes No ) I hold the ChFP designation ( Yes No )  
I am a member of the Financial Planning Association ( Yes No )

(g) **Other:** Please describe estate and tax planning experience as Investment advisor, financial planner, tax consultant, IRS auditor or practitioner of related occupation (below or on a separate sheet).

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Applicant

**Please print out and send** (include check for membership fee of **\$165.00**) to:  
**Estate and Tax Planning Council of Eastern Connecticut, Inc., P.O. Box 152, Mystic, CT 06355**  
For more information email us at [mail@etpcec.org](mailto:mail@etpcec.org)