



THE TAMPA BAY ESTATE PLANNING COUNCIL

2023-2024 Membership Application

Contact Information (please print)

Name _____
 Firm _____
 Address _____
 City _____ ZIP _____
 Phone _____
 Email _____

Do not publish email Do not publish

Have you ever been a member of this Council? Yes No If yes, last year of your membership _____

Membership Discipline (please select one)

- | | |
|---|--|
| <input type="checkbox"/> Attorney & member of the Florida Bar
Year admitted to Florida Bar _____ | <input type="checkbox"/> Insurance professional as |
| <input type="checkbox"/> Certified Public Accountant (CPA) | <input type="checkbox"/> Chartered Life Underwriter (CLU) |
| <input type="checkbox"/> Trust Officer of a Registered Regulated Trust Dept. | <input type="checkbox"/> Chartered Financial Consultant (ChFC) |
| <input type="checkbox"/> CFP® professional Year certified _____ | <input type="checkbox"/> MDRT Qualifying or Life Member |

Signature: _____

Required Recommendations

- One TBEPC member from the same member discipline, and
- One TBEPC member from a different member discipline, and
- A letter of recommendation from any TBEPC member.

**Primary Signature will receive credit for member-get-a-member contest.

Recommended by (must be current members)

**Primary Signature _____
 Print Name _____
 Discipline _____
 Secondary Signature _____
 Print Name _____
 Discipline _____

Membership dues: \$250

**Send completed form, letter of recommendation and check
made payable to Tampa Bay Estate Planning Council**

**Tampa Bay Estate Planning Council
12191 W Linebaugh Ave #312
Tampa, FL 33626**