



# THE TAMPA BAY

## ESTATE PLANNING COUNCIL

### 2025-2026 Member Information Update

#### Contact Information (please print)

Name \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

☐ Do not publish email      ☐ Do not publish

#### Membership Category

☐ **Accounting & Valuation**  
CPA (Florida), CPA/PFS, Valuation CFA, ABV

**Trust and Planned Giving**  
CTFA, CSPG, CAP®

☐ **Financial Planning & Insurance**  
CFP®, ChFC®, CFA, CLU®, Florida Insurance  
License holder

☐ **Allied Professional**  
Field \_\_\_\_\_

☐ **Law**

☐ **Emeritus**

Signature: \_\_\_\_\_

**Member Renewal**  
**215 if received by October 5, 2025**  
**\$225 if received between October 6 – December 31, 2025**  
**Emeritus Renewal: \$175**

Send completed form, check made payable to Tampa Bay Estate Planning Council