



# THE TAMPA BAY

## ESTATE PLANNING COUNCIL

### 2026-2027 Member Information Update

#### Contact Information (please print)

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ ZIP \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_

Do not publish email       Do not publish

#### Membership Category

- |   |   |
|---|---|
| <input type="checkbox"/> <b>Accounting &amp; Valuation</b><br>CPA (Florida), CPA/PFS, Valuation CFA, ABV                          | <input type="checkbox"/> <b>Trust Officers</b><br>CTFA                    |
| <input type="checkbox"/> <b>Financial Planning &amp; Insurance</b><br>CFP®, ChFC®, CFA, CLU®, Florida Insurance<br>License holder | <input type="checkbox"/> <b>Planned Giving Philanthropy</b><br>CSPG, CAP® |
| <input type="checkbox"/> <b>Law</b>   | <input type="checkbox"/> <b>Allied Professional</b><br>Field _____        |
|   | <input type="checkbox"/> <b>Emeritus</b>                                  |

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

**Member Renewal**  
**\$300 if received by August 31, 2025**  
**\$350 if received between September 1 – December 31, 2025**  
**Emeritus Renewal: \$175**

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