

GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

215 Godwin Avenue, #33, Midland Park, NJ 07432

<http://www.gnjepec.org>

NEW MEMBER APPLICATION FOR 2017 - 2018

Name: _____

Firm: _____

Business Address: _____

Bus. Phone: _____ **Fax:** _____

Email: _____

LinkedIn: _____

(Print Clearly. Meeting Notices will be sent as an attachment to email)

Cell Phone (Optional) _____ **Website:** _____

Primary Field of Practice (check): **ACCOUNTING** **LAW** **INSURANCE**

FINANCIAL ADVISOR/PLANNER **TRUST ADVISOR** **ALLIED PROFESSIONAL**

Note: All information above this sentence will be published on the public GNJEPC website unless you opt out by checking here: _____

How did you hear about GNJEPC? _____

REFERRAL – Please indicate the name of the sponsoring Member. If none, a Committee Member will reach out to you.

Educational Background and Work Experience: (Resume Optional): _____

Estate Planning Experience: _____

Please note: If you have less than three (3) years' estate planning experience, you are invited to apply for membership as an Associate Member. Please check here if applying for Associate Membership: _____
Please describe what you feel you bring to the Council:

For Continuing Education Credits please indicate desired credits (when approved):

CPA Attorney CFP Insurance

CFP License # _____ or Last four digits of SSN _____ for CFP

NJ Life Insurance License # _____

CERTIFICATION:

By signing and submitting this application, the applicant certifies (1) that he/she has practiced estate planning or practiced in a related field for at least 3 of the 5 years prior to this application (if not applying for an Associate membership); (2) that all licenses and or designations, if any, held by applicant are current and in good standing including continuing education requirements; and (3) that he/she agrees to adhere to and respect the ethical standards of his or her own profession and the independence and standards of the other professions and disciplines represented in the Council.

X _____ Date: _____

Applicant (Typing your name here constitutes your signature)

Annual Dues are \$395 which includes the cost for all meetings, attendance, meals, and material, from September 2017 - June 2018. If you apply for council membership after the January meeting, the cost for mid-year membership is \$295. Please print the completed application and sign and date it.

Payment options are as follows:

1. Make your check payable to GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC. and mail to:
Greater New Jersey Estate Planning Council, Inc., 215 Godwin Avenue, #33 Midland Park, NJ 07432
2. If you prefer to pay by credit/debit card, you can use PayPal. The link is provided below and is on our website (a \$12.50 service charge will be added to your dues):

Paypal:

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=RA7QMH2VMVWDE

and then submit your application.