



# Denver Estate Planning Council



## MEMBERSHIP APPLICATION

Please mail completed form to DEPC, P.O. Box 370596, Denver, CO 80237 or email to [steph.hill@yahoo.com](mailto:steph.hill@yahoo.com)

First Name: \_\_\_\_\_ M.I. \_\_\_\_\_ Last Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Office Address: \_\_\_\_\_

Company: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Office Fax: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home Fax: \_\_\_\_\_

I have been a resident of \_\_\_\_\_ for \_\_\_\_\_ years.  
(City)

I have been actively engaged in Estate Planning for \_\_\_\_\_ years.

**Active membership is generally limited to professionals who actively practice and exhibit experience in estate planning in the categories listed below. Please complete the section below that applies to your current employment.**

An active **Insurance Life Underwriter** - required to have the designation of CLU, CPA, Attorney, or are an owner of the firm.  
 I am a member in good standing of the Life Underwriters Association Chapter of Chartered Life Underwriters.  
I have been a Life Underwriter for \_\_\_\_\_ years. I am an:  Agent,  Manager,  General Agent of the \_\_\_\_\_ company. I received my Chartered Life Underwriter designation in the year \_\_\_\_\_.

An active **Trust Officer** of a Bank or Trust Company which has an active Trust Department.

I am a \_\_\_\_\_ of the \_\_\_\_\_  
(Title) (Your Bank or Trust Company)

I have been a Trust Officer for \_\_\_\_\_ years.

I am a  CTFA,  CFP,  CTFC,  Attorney,  CPA,  Other \_\_\_\_\_.

- An **Attorney** actively engaged in the practice of law and estate planning.  
 I am a member in good standing of the Bar Association.  
I have been admitted to practice law in Colorado for \_\_\_\_\_ years.

- An **Accountant** actively engaged in the accountancy profession (required to have the CPA designation).  
 I am a member in good standing of the Institute of Accountants and am a Certified Public Accountant.  
I have practiced accounting as a:  Principal,  Partner,  Member of the Tax Department of an Accounting Firm in Colorado for \_\_\_\_\_ years.

- An **Accredited Financial Planner, Advisor or other Financial Professional** who has achieved the designation of CFP, ChFC, CFA, PFS, Other \_\_\_\_\_.  
Please indicate your professional affiliation and job title: \_\_\_\_\_  
I have been a practicing Financial Professional for \_\_\_\_\_ years.

**Statement as to estate planning experience and ways in which applicant can contribute to the Council:**

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Recommended by three current DEPC members (one must be from the same profession as the applicant; only one may be employed by the same firm):

1. \_\_\_\_\_ (Name) \_\_\_\_\_ (Phone)
2. \_\_\_\_\_ (Name) \_\_\_\_\_ (Phone)
3. \_\_\_\_\_ (Name) \_\_\_\_\_ (Phone)

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

\_\_\_\_\_  
Date