

NEW MEMBER APPLICATION
BLUEGRASS ESTATE PLANNING COUNCIL

Mail to: Melissa Gregory
768 Eureka Drive
Versailles, KY 40383
(859) 879-6035

1. Name _____ SSN _____
Business Name/Firm _____
Office Address _____
Telephone _____ Fax _____ E-Mail _____

2. I have been actively involved in Estate Planning for ____ years.

3. I am a member in good standing of the:
_____ Bar Association.
_____ Institute of Accountants and am a Certified Public Accountant.
_____ Chapter of the Society of Financial Service Professionals
_____ (Other Professional Association)

4. I have been admitted to practice law in _____
for ____ years.

I have practiced Accounting as a:

- a) __ Principle
- b) __ Partner
- c) __ Member of the Tax Department of an Accounting Firm.

I received my CLU or ChFC or other related designation in the year _____. I entered the life insurance / financial services business in the year _____.

I am a _____ of the _____ Bank or Trust Company
(Title)

5. **Please attach a statement or use the back of this form to indicate your estate planning experience and ways in which you can contribute to the Council.**

Applicant's Signature _____ Date _____

Recommended by: _____ **Second Endorsement:** _____

(One of the above endorsements should be from the same profession as the applicant.)

DATE DUES PAID _____

DATE APPROVED _____

ANNUAL DUES ARE \$160.00

Notice: None of the Bluegrass Estate Planning Council dues are used for lobbying expenses.