

**CENTRAL ARIZONA ESTATE PLANNING COUNCIL  
2009-2010 SEASON**

**Membership Application**

Must be received by **September 05, 2009**, for inclusion in the 2009-2010 Membership Roster.  
The information as it appears below will be the published data.

<b>Default Renewal Option/Membership will renew annually (circle one): Yes or No</b>	
<b>Name:</b>	
<b>Firm:</b>	<b>Telephone:</b>
<b>Email:</b>	<b>Fax:</b>
<b>Address/City/State/Zip:</b>	
<b>Licenses, Professional Designations or <i>*Respective Category (*for board designated apps):</i></b>	

Membership Category(see back for eligibility details): Please check one....

<input type="checkbox"/> Attorney (must be licensed in Arizona)	<input type="checkbox"/> Financial Planners
<input type="checkbox"/> CPA	<input type="checkbox"/> Actuaries
<input type="checkbox"/> Enrolled IRS Agents	<input type="checkbox"/> Planned Giving Professionals
<input type="checkbox"/> Trust Officers	<input type="checkbox"/> Appraisers
<input type="checkbox"/> Life Insurance Professionals	<input type="checkbox"/> *Board Designated

<b>Meal Preference (for the season) please circle one</b>	<i>Standard Menu</i>	<i>Vegetarian Meal</i>
<b>YES, add my firm website link to the CAEPC website</b>	Add \$25 to your membership check	Website address:

By submission of this application it is agreed that if payment is made by the employer of the applicant, the employer may transfer the membership to another of its employees (qualified as eligible for the membership) upon written notice received by CAEPC.

Return this completed membership application with a check for \$425, plus \$25 for the website link if applicable, *payable to*: **Central Arizona Estate Planning Council**

mail to: CAEPC c/o Premium Organization, PO Box 4130, Scottsdale, AZ 85261-4130  
If using a credit card, please complete the information below and fax or mail your application.

Cardholder Full Name	Card Number
Exp Date	safety digits (reverse side of card)
Signature/Printed Name	MC/Visa Only

Central Arizona Estate Planning Council  
*in care of*: Premium Organization  
PO Box 4130, Scottsdale, Arizona 85261-4130  
[www.caepc.org](http://www.caepc.org)  
Phone: 602-840-2900 E-mail: [info@CAEPC.org](mailto:info@CAEPC.org) Fax: 480-922-5283

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2009-2010 SEASON**

**Eligibility for Central Arizona Estate Planning Council**

Persons eligible for membership in the corporation are as follows:

1. Members of the State Bar of Arizona;
2. Certified Public Accountants or Public Accountants licensed in the State of Arizona;
3. Enrolled Agents licensed by the Internal Revenue Service;
4. Trust Officers (employees of corporate fiduciaries engaged in the administration of Trusts and Estates) meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-Laws of the corporation, including, but not limited to those holding the CTFA designation;
5. Life Insurance professionals meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those: (a) with five years' experience; (b) Chartered Life Underwriters (CLU); (c) current of life members of the Million Dollar Round Table; or (d) members of the Association of Advanced Life Underwriters;
6. Money Managers and Financial Planners meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those with the following designations: Chartered Financial Analysts (CFA); Certified Financial Planners (CFP); Chartered Financial Consultants (ChFC), Accredited Estate Planners (AEP); Certified Financial Managers (CFM), Certified Estate Planning Specialists (CEPS); or Master of Financial Services (MSFS);
7. Actuaries who are Enrolled Actuaries under the Employee Retirement Income Security Act of 1974;
8. Planned Giving Professionals meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those holding the CFRE designations;
9. Appraisers meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those holding the ASA designation;
10. Such additional members or categories of members as the Board may from time to time provide in the By-laws of the corporation or as the Board grants specific approval.

Revised 8-2006

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