



SAN ANTONIO ESTATE PLANNERS COUNCIL

An Organization of Attorneys, Certified Financial Planners, Certified Public Accountants, Chartered Life Underwriters and Trust Officers Formed to Promote the Advancement of Estate Planning

MEMBERSHIP APPLICATION (September 2026-May 2027)

NAME: _____

FIRM: _____

MAILING ADDRESS: _____

CITY/STATE: _____ ZIP: _____

EMAIL ADDRESS: (for meeting notices) _____

ADDITIONAL EMAIL ADDRESS: (assistant, secretary) _____

ASSISTANT/SECRETARY'S NAME: _____

WEBSITE ADDRESS: _____

PHONE: _____ FAX: _____

MEMBER SINCE (YEAR): _____ EMAIL PICTURE (JPEG FORMAT) FOR ON-LINE DIRECTORY

DESIGNATION (CIRCLE ALL THAT APPLY & INCLUDE LICENSE OR DESIGNATION NUMBER, IF APPLICABLE)

ATTORNEY: CLE# _____ CFP®: CFP# _____ CPA: CPE# _____

TRUST OFFICER: CTFA# _____ CLU® ChFC® AEP®

OTHER(S): _____

Membership Dues (New and Renewing Members): \$315.00

Pay Online - Issues with link - visit <http://www.sanantonioepc.org>; at the top, select "Membership" dropdown menu and scroll down to "Membership Renewal"; follow prompts to enter credit card information or Print and mail the Membership Application with a check made payable to SAEPC for \$315.00 and address to: SAEPC, Attn.: Lynn Getz, P.O. Box 780843, San Antonio, Texas 78278.

GET INVOLVED:

Check any of the boxes below if you would like to become more involved with the SAEPC:

_____ Networking _____ Docket Call _____ Membership