



# PHILADELPHIA ESTATE PLANNING COUNCIL

P.O. BOX 579 • MOORESTOWN, NJ 08057-0579

TELEPHONE: 856-234-0330 • FAX: 856-727-9504

WWW. PHILAEP.C.ORG • STAFF@PHILAEP.C.ORG

## MEMBERSHIP APPLICATION

### Contact Information

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address 1 \_\_\_\_\_

Address 2 \_\_\_\_\_

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

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

Website \_\_\_\_\_

Referred by \_\_\_\_\_

### **Discipline (please check one):**

- |   |   |
|---|---|
| <input type="radio"/> Accountant                | <input type="radio"/> Financial Planning  |
| <input type="radio"/> Attorney                  | <input type="radio"/> Insurance           |
| <input type="radio"/> Banking/Trust Admin.      | <input type="radio"/> Investments         |
| <input type="radio"/> Charitable Planned Giving | <input type="radio"/> Valuation/Appraisal |
| <input type="radio"/> Education                 | <input type="radio"/> Other               |

### **I would like to volunteer for the following committee(s):**

- |                                      |  |
|--------------------------------------|--|
| <input type="radio"/> Annual Meeting | <input type="radio"/> Programs           |
| <input type="radio"/> Awards         | <input type="radio"/> Roundtable         |
| <input type="radio"/> Ethics         | <input type="radio"/> Social             |
| <input type="radio"/> Membership     | <input type="radio"/> Sponsorship        |
| <input type="radio"/> Newsletter     | <input type="radio"/> Technology         |
| <input type="radio"/> Outreach       | <input type="radio"/> Women's Initiative |

### **Membership Process:**

All new applicants must be approved by the PEPC Board of Directors. The Board meets eight times a year to approve new members. All new applicants will be entered into the council database as a "member in process" until they are officially approved. Upon approval, new members will receive an email from the PEPC Office.

### **Payment Information**

Contributions or gifts to PEPC are not deductible as charitable contributions for federal tax purposes. Payments of membership dues may be deductible as an ordinary and necessary business expense. Please consult your tax advisor.

**PEPC Tax ID #23-2006494**

### **Membership Type:**

Graduate Student - \$50.00  
(must provide student ID to receive discount)

Regular Council Member - \$125.00

Check Enclosed (payable to PEPC)

Credit Card Payment

Visa     MasterCard     Amex     Discover

Cardholder's Name: \_\_\_\_\_

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ CCID: \_\_\_\_\_

Billing Address: \_\_\_\_\_

Cardholder's Signature: \_\_\_\_\_

### **Affirmation**

By submitting my dues payment, I am certifying to the PEPC that no professional accreditation agency or organization with jurisdiction over the conduct of members of the discipline for which I am registered with the PEPC has revoked such accreditation.

Please return your completed form and  
\$125 membership dues payment to:

**PEPC Office**

**P.O. Box 579**

**Moorestown, NJ 08057**

**Fax: 856-727-9504**

**Renew Online at [www.philaepc.org](http://www.philaepc.org)**

Questions? Call 856-234-0330 or

E-mail [Staff@PhilaEPC.org](mailto:Staff@PhilaEPC.org)