
BEPC MEMBERSHIP APPLICATION - *Financial Advisor*

An active financial advisor member shall be at all times during his or her active membership a financial professional who is actively engaged in estate planning in the State of Maryland.

A financial advisor is not required to hold a professional designation, but a financial advisor who holds a professional designation such as CLTC, CLU®, CVA, ChFC®, CFP® or CFA, and is in good standing with the organization that sponsors the designation, is presumed to be qualified in estate planning.

I hereby apply for membership in the Baltimore Estate Planning Council as a Financial Advisor member.

NAME: _____

DESIGNATION(S): _____

FIRM:

JOB TITLE: _____

JOB POSITION: _____

ADDRESS: _____

CITY _____ STATE: _____ ZIP: _____

TELEPHONE: _____ FAX: _____

E-MAIL ADDRESS: _____

YOUR WEBSITE (TO BE PUBLISHED IN DIRECTORY): _____

MEMBERSHIP SPONSORS

All applicants for qualified financial advisor membership shall be sponsored by two active Council members, one of whom shall be a qualified financial advisor member who shall not be connected professionally with the firm with which the applicant is then associated.

SPONSOR #1: I hereby sponsor the above named applicant for membership

PRINTED NAME: _____

FIRM NAME: _____

SIGNATURE: _____

SPONSOR #2: I hereby sponsor the above named applicant for membership

PRINTED NAME: _____

FIRM NAME: _____

SIGNATURE: _____

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ANNUAL DUES OF \$120.00 MUST BE INCLUDED WHEN APPLYING FOR MEMBERSHIP

PAYMENT OPTIONS Check Enclosed *or*
 Charge my: Visa MasterCard American Express

Card Number: _____

Security (CSV) Code: _____ Expiration Date: _____

Signature on Card: _____

Printed Name as appears: _____

Baltimore Estate Planning Council
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