

**WICHITA ESTATE PLANNING COUNCIL, INC**

**APPLICATION FOR MEMBERSHIP**

→ **NOTE:** All applications for membership must be approved by the Board of Directors

*Please type information*

Name \_\_\_\_\_

Name of Firm \_\_\_\_\_

Address of Firm \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Years in area of practice \_\_\_\_\_ Designation(s) \_\_\_\_\_

Please indicate what discipline(s) you practice → see classifications on the next page.

☐ Attorney

☐ CLU, ChFC, Insurance

☐ CPA or ☐ Accountant

☐ Trust Officer, Bank Executive

☐ CFP or ☐ Financial Advisor

☐ Associate (if none of the above apply): Profession/Title \_\_\_\_\_

Contact at firm for reference: \_\_\_\_\_

Email Address: \_\_\_\_\_

Name of your WEPC sponsor: \_\_\_\_\_

Date: \_\_\_\_\_

**RETURN COMPLETED FORM TO:**

Wichita Estate Planning Council  
P O Box 782371  
Wichita, KS 67278  
or  
WichitaEPCouncil@gmail.com

Date application received \_\_\_\_\_

Date of Board approval \_\_\_\_\_

## Wichita Estate Planning Council Bylaws

### **Article III MEMBERSHIP**

#### **Section 1. CLASSIFICATIONS REPRESENTED**

Those eligible for membership in this corporation shall be those who have been actively engaged in estate planning work, maintain a professional certification(s) and/or degree(s) associated with the following categories, and are in good standing with the board or organization that monitors the maintenance of said certification and/or degree:

- a. **Accountants** (members in good standing with the Kansas Board of Accountancy or individuals who hold a CPA certificate).
- b. **Attorneys** (members who are licensed attorneys in the State of Kansas and are in good standing with the Kansas Supreme Court).
- c. **Financial planners and advisors** (such as members in good standing with the Financial Planning Association or individuals who hold the CFP® designation).
- d. **Insurance advisors** (such as members in good standing with the National Association of Insurance and Financial Advisors (NAIFA), or individuals who hold the CLU or ChFC designation).
- e. **Trust officers** and bank executives.
- f. **Associate members:** Other professionals in estate planning related disciplines (such as certified legal assistants, enrolled agents, executive officers of not-for-profit organizations), admitted at the discretion of the Board of Directors.

#### **Section 2. NEW MEMBERS**

Each application for membership shall be sponsored by a member who shall propose the name of the applicant to the Board from any or all of the above classifications, and if approved by a majority vote of the Board, invitation shall be extended. If at any time there is a waiting list of persons who have been approved for membership, those on the waiting list shall be entitled to preference in such membership invitations.

#### **Section 7. TRANSFER OF MEMBERSHIP**

Membership in the Corporation is not transferable or assignable.