



SOUTH PLACER ESTATE PLANNING COUNCIL ("SPEPC")

Mission, Vision, and Purpose:

To provide a forum for estate planning professionals to meet and learn from one another in a generous and supportive environment, and to be a valuable community resource so that every person who needs help in any phase of estate planning or administration will find a competent and compassionate professional who can give them the help they need.

APPLICATION AND CONTRACT OF MEMBERSHIP

Please attach your business card to the application.

Name/Title of Applicant: _____
[THIS IS EXACTLY HOW YOU WILL BE LISTED IN THE DIRECTORY]

Name of Business/Employer: _____

Address: _____

Telephone (business): _____

Telephone (mobile): _____

Facsimile: _____

E-mail: _____

Website: _____

Professional licenses (including number) (this information will not be listed in the directory):

Your membership dues include listing in the directory in one of the following general professional categories. Listing in a particular category does not mean a member carries any specific license or certification. If you want your license/certification included in your online listing, be sure to include that information above. Additional categories are \$20.00 each (please check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> Accounting & Tax | <input type="checkbox"/> Legal |
| <input type="checkbox"/> Fiduciary Services | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Financial Advisor | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Charitable Non-Profit | <input type="checkbox"/> Other (specify): _____ |

How did you hear about the SPEPC? _____

Do you have a bona fide interest in estate planning? _____ Yes _____ No

Do you have the ability to bring relevant estate planning information to the membership group? _____ Yes _____ No

Do you agree to uphold the mission, vision, and purpose of the SPEPC, as stated above? _____ Yes _____ No

The benefits of membership in the SPEPC are the following:

- (a) listing on, and linking with, the SPEPC's web site;
- (b) promotion of members' seminars and other events;



- (c) a reduced monthly meeting fee (as compared to non-members), which includes dinner and continuing education credit, when available;
- (d) priority registration at limited attendance events;
- (e) free December mixer for early renewal; and,
- (f) the opportunity to serve as a committee member, director, and/or officer of the SPEPC corporation.

The term of each membership is the calendar year, renewable for successive calendar year terms at the member's election by payment of the annual membership fee on or before the first monthly member meeting of the calendar year. Members pay an annual membership fee of \$135.00. The annual fee for membership will be \$135.00, and will be prorated quarterly for new members joining mid-year as follows:

Jan -Feb - Mar	Apr-May-Jun	Jul-Aug-Sep	Oct-Nov-Dec
\$ 135.00	\$ 100.00	\$ 70.00	\$ 35.00

A membership will terminate, with no refund for any portion of a paid membership fee, upon the occurrence of any of the following events: (a) resignation of the member in writing; (b) the death of the member; or, (c) upon the determination of the Board of Directors, in its sole discretion, that the member has (i) failed to maintain eligibility for membership, (ii) failed to adhere to any provision of the Bylaws or the SPEPC's Operating Rules, or (iii) committed any act or omission that is illegal, not in furtherance of the purpose and objectives of the SPEPC, or has caused or may cause harm to the SPEPC's reputation. Termination will be valid and effective only if the member has been given written notice of the grounds for termination, the Board of Directors has provided an opportunity for the member to come before the Board and be heard during the thirty (30) calendar day period following the notice, and the member has either come before the Board or declined to do so during this period. The decision of the Board of Directors will be final.

In addition to the annual membership fee, the current fee to attend the monthly member meetings, which includes dinner and continuing education credit, when available, is \$35.00 (non-members pay \$45.00). This fee is subject to change without notice. Meeting fees are due and payable to the SPEPC no later than the start time of the monthly meeting. Reservations to attend the SPEPC's monthly member meetings must be made no later than the required deadline as posted by Meeting Coordinator. Any person who makes a reservation and cancels prior to the required deadline will not be obligated to pay the monthly member meeting fee, and if payment was made, will be refunded. Any person who makes a reservation and does not cancel prior to required deadline must pay the monthly member meeting fee, and will be invoiced for the fee by the SPEPC.

My signature below indicates that I agree to the provisions above, and promise to read the SPEPC's Bylaws and Operating Rules, and abide by their provisions.

Dated: _____

[Signature of Applicant]

Please submit your application one of two ways:

1. **Mail application with check in the appropriate amount payable to "SPEPC" at:**
SPEPC Membership, 1911 Douglas Blvd., Ste 85 PMB 369, Roseville, CA 95661
2. **E-mail application to current Vice President - Membership Officer at**
membership@southplacerepc.org. An invoice will be e-mailed for electronic payment.

[For SPEPC use only]

\$ _____ Received from applicant for annual dues. Check # _____
 _____ License status verified (date and initial).
 _____ Application approved by Vice President Membership (date and initial).
 _____ Application approved by Board of Directors (President date and initial).
 _____ Added to membership list and web site (date and initial).