

**MEMBERSHIP APPLICATION**  
**RACINE KENOSHA ESTATE PLANNING COUNCIL**

1. Name \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

Title \_\_\_\_\_

2. Company \_\_\_\_\_

3. Mailing Address \_\_\_\_\_

\_\_\_\_\_

4. E-mail Address \_\_\_\_\_

5. I have been actively engaged in Estate Planning and/or Employee Benefits for \_\_\_\_\_ years.

Below are the qualifications for membership:

1. The Council shall consist of representatives of trust companies and banks maintaining trust departments, life underwriters who hold either a Chartered Life Underwriter or Chartered Financial Consultant designation, lawyers who are members of the State Bar of Wisconsin, certified public accountants who are members of the Wisconsin Institute of Certified Public Accountants, and any other professional actively interested and engaged in the estate planning and/or employee benefit fields.
2. New members shall be elected to the Council by majority vote of the Executive Committee.
3. All members shall be eligible to vote in meetings of the Council and to hold any elective office or position in the Council.
4. Any member who fails to pay the annual dues to the Council within one (1) month of the mailing to him/her of a second notice thereof shall forthwith cease to be a member of the Council.

I hereby apply for membership in the Racine Kenosha Estate Planning Council.

My profession is: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_