

**VICTORIA ESTATE PLANNING COUNCIL
MEMBERSHIP APPLICATION**

General Information

Date	
Name	
Firm	
Address	
Phone	Fax:
Email	
Governing Professional Body	
Years of estate planning experience	

Membership Category

Please indicate your membership category with an X. Indicate all that apply as some categories might be full.

Category	
Accountant	
Chartered Life Underwriter	
Lawyer	
Trust Administration / Officer	
Financial Planner	
Portfolio Manager	
Other (please explain)	

Confidential Information

Describe the nature of your current involvement in estate planning or administration.

You must be nominated for membership by a current Victoria Estate Planning Council member. Please indicate the name and phone number of that member.

Nominator: _____ Phone: _____

Have you ever been the subject of any investigation or disciplinary action by any professional body? Please circle YES or NO

Have you ever declared bankruptcy? Please circle YES or NO

If you have answered yes to either of the above questions, please give details.

Agreements

By submitting this application form you agree to the following:

1. A member of the Victoria Estate Planning Council (VEPC) may contact third parties to verify the accuracy and completeness of any information that you have provided.
2. The VEPC may communicate with you by email or other electronic form of transmission.
3. The VEPC may disclose the information set out above under the heading "General Information". For example, the VEPC may include that information in a general membership list that is made available to other members.
4. The VEPC may disclose information under the heading "Confidential Information" but may do so only to the members of the VEPC Executive Council, who will use that information only for the purpose of evaluating the application for membership.

General Information

Once this application is submitted to the Membership Chair, you will be contacted with a request to submit your curriculum vitae. When the Chair has both your application and your CV it will be presented to the Executive Council and reviewed. A decision regarding acceptance will be communicated to you as soon as possible.

The current membership fee is \$150 per year which runs July 1st to June 30th. Do not send membership fees with this application. Fees are pro-rated for members joining part way through a membership year. You will be advised of the fee that is payable once the membership is accepted.

Regular VEPC luncheons are held at the **Union Club from 12 noon to 1:30pm** on the **second Tuesday of each month** from September to November and January to June.

There is also a special December luncheon, the date and location of which may vary annually.

Every second year the May luncheon is supplanted by a half-day seminar.

The Annual General Meeting is held at the September meeting.

---END OF APPLICATION---