

The Suncoast Estate Planning Council (SEPC) is a proud member of the National Association of Estate Planners and Councils (NAEPC). SEPC is dedicated to providing its professional members with outstanding educational programs. The members of the local Council, since its inception in 1990, have provided invaluable information to individuals and families as they are developing their estate plans. With their guidance, millions of dollars have been reallocated to benefit the families themselves as well as the many wonderful not-for-profit organizations throughout our community. SEPC is a legacy leader in the Tampa Bay Community.

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**ROUNDTABLE MEETING  
SCHEDULE 2018/2019**

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September	Fall Social
October 18th	Meeting
November 15th	Meeting
December 6th	Meeting
January 17th	Meeting
February 14th	Meeting
March 14th	Meeting
April 18th	Meeting
May 9th	Meeting

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**SUNCOAST ESTATE  
PLANNING COUNCIL,**

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- I spend a significant portion of my time in estate planning.
- I understand that if I cease to be qualified in one of the categories for membership listed, I must immediately notify the Secretary and my membership shall cease. In such case, I may be entitled to a refund of a portion of my dues for the year of qualification.
- I understand that the Suncoast Estate Planning Council, Inc. prohibits the use of a membership in any form of advertising or solicitation of business.

Signature: \_\_\_\_\_

**SUNCOAST ESTATE PLANNING  
COUNCIL, INC.  
P. O. BOX 3631  
ST. PETERSBURG, FL 33731**

Phone: 727-642-9000  
Email: [admin@suncoastepc.org](mailto:admin@suncoastepc.org)  
[www.suncoastepc.org](http://www.suncoastepc.org)



***—Membership—***

Associate Member

Attorneys

Certified Financial Planners

Certified Public Accountants

Charitable Organization

Executives [501(c)(3)]

Chartered Life Underwriters

Trust

Company/Division/Department

Employees

Chartered Financial Consultants

Accredited Estate Planners

Emeritus (Retired)

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*Member of the National Association of Estate  
Planners and Councils*

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## SUNCOAST ESTATE PLANNING COUNCIL, INC.

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The Suncoast Estate Planning Council was officially organized in 1990. The Council has successfully created an opportunity for local estate planners to network, socialize and continue their education on pertinent estate planning information. Membership today consists of approximately 110 professionals.

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### COUNCIL OBJECTIVES

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1. To maintain the highest standard of ethics and service in providing informed guidance in the creation, conservation, and distribution of trusts and estates.
2. To promote and further the study of the technical and practical aspects of estate planning education to its members.
3. To promote cooperation among its members of the different disciplines which are part of the estate planning process.

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### MEETINGS

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The membership gathers monthly for either a breakfast roundtable meeting or a lunch meeting. Meetings are typically held at All Children's Hospital Education and Conference Center (701 4th Street South, St. Petersburg), 8:00–9:00 a.m. with the opportunity network a half hour prior. Membership Socials are held twice a year. Meeting notices are sent via email prior to each meeting.

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## MEMBERSHIP DUES

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Membership dues include all breakfast and lunch meetings plus the socials. Annual dues are \$225.00 (Associate Members are \$245) for a complete fiscal year (June–May). Members joining during the year are charged based on the following sliding scale:

Sept.–Nov. = \$225.00

Dec. –Feb. = \$155.00

Mar. –May = \$105.00

Membership dues should be made payable to the Suncoast Estate Planning Council.

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### TO JOIN

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Applicants are required to obtain recommendations from two current members, one of whom shall be in the same profession or discipline as the applicant, only one sponsor can be from the applicants institution. Associate Members require three sponsors. A letter of recommendation from each sponsor (listed below) must be attached to this application when submitted.

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### RECOMMENDED BY: (ASSOCIATE MEMBERS REQUIRE THREE)

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1. Print Name and Category:

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2. Print Name and Category:

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

3. Print Name and Category:

\_\_\_\_\_  
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## MEMBERSHIP APPLICATION

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\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Mailing Address

\_\_\_\_\_  
Business Phone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
E-Mail

\_\_\_\_\_  
Would you like your information  
listed on our website?

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### PROFESSIONAL CATEGORY

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- Associate Member
- Attorney at Law
- Certified Financial Planner
- Certified Public Accountant
- Charitable Organization Executive
- Chartered Life Underwriter
- Trust Company/Division/  
Department Employee
- Chartered Financial Consultant
- Accredited Estate Planner
- Emeritus (Retired)