



SUNCOAST ESTATE PLANNING COUNCIL

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 90 professionals.

Council Objectives:

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

Meetings:

The membership gathers monthly for a breakfast or lunch roundtable meeting. Meetings are typically held in St. Petersburg, breakfast meetings are held from 8:00–9:00 a.m., and lunch from noon–1:00 p.m.; both meetings have the opportunity to network a half hour prior.

Membership Socials are held twice a year. Meeting notices are sent via email prior to each meeting.

Membership Dues:

Membership dues include all breakfast and lunch meetings plus the socials. Annual dues are \$350.00 (associate members are \$400) for a complete fiscal year (June—May). Members joining during the year are charged based on the following sliding scale:

Sep.—Nov. - \$350.00

Dec.—Feb. - \$262.50

Mar.—May - \$87.00

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

Qualifications for Membership:

Those persons who make contributions to the Corporation and are in the following occupations or have one of the following professional designations who spend a significant portion of their professional time in the estate planning or estate/trust administrative process shall be eligible for membership in this Corporation.

- Attorney at Law
- Trust Officer/Certified Trust and Fiduciary Advisor (CTFA)
- Chartered Life Underwriter
- Chartered Financial Consultant
- Certified Public Accountant
- Charitable Organization Executive
- Certified Financial Planner
- Chartered Financial Analyst
- Accredited Estate Planner
- Emeritus (Retired from any of the above mentioned designations)

Roundtable Meeting Schedule 2023/2024:

September Social
October Meeting
November Meeting

December Meeting
January Meeting
February Meeting

March Meeting
April Meeting
May Social

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 many wonderful not-for-profit organizations throughout our community. SEPC is a legacy leader in the Tampa Bay Community.



NAEPC
NATIONAL ASSOCIATION OF
ESTATE PLANNERS & COUNCILS
COLLABORATE · EDUCATE · CULTIVATE

To Join:

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

Recommended by: (Associate Members require three)

1. Print Name and Category:

2. Print Name and Category:

3. Print Name and Category:

Membership Application:

Name

Title

Firm

Mailing Address

Business Phone

Fax

E-Mail

Would you like your information listed on our website? _____

Professional Category (check at least one):

- | | |
|--|--|
| <input type="checkbox"/> Associate Member | <input type="checkbox"/> Chartered Life Underwriter |
| <input type="checkbox"/> Attorney at Law | <input type="checkbox"/> Trust Officer/Certified Trust and
Fiduciary Advisor (CTFA) |
| <input type="checkbox"/> Certified Financial Planner | <input type="checkbox"/> Chartered Financial Consultant |
| <input type="checkbox"/> Certified Public Accountant | <input type="checkbox"/> Accredited Estate Planner |
| <input type="checkbox"/> Charitable Organization Executive | <input type="checkbox"/> Emeritus (Retired) |
| <input type="checkbox"/> Chartered Financial Analyst | |

I spend a significant portion of my time in estate planning

I understand that if I cease to be qualified in one of these categories for membership, 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:

Sponsor Letter
For application to the Suncoast Estate Planning Council

Date: _____

RE: Membership Application for: _____

I am personally acquainted with the above applicant and believe this applicant has sound professional ethics. As a member of the Suncoast Estate Planning Council, I feel that this applicant will be a credit to our Council and will make a responsible contribution to the Council

Additional information:

Length of time acquainted with applicant: _____

Applicant is/is not a member of my firm

Remarks:

I recommend approval of the above applicant and am pleased to sponsor them for membership.

Signature of Sponsor _____

Sponsor's Name (please print) _____

Sponsor's Firm and Telephone Number _____

This form must accompany application for membership to SEPC and be mailed to:
Suncoast Estate Planning Council
PO Box 3631
St. Petersburg, FL 33731