

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.

ROUNDTABLE MEETING SCHEDULE 2022/2023

September	Social
September 19th	Meeting
October 13th	Meeting
November 10th	Meeting
December 8th	Meeting
January 26th	Meeting
February 23rd	Meeting
March 23rd	Meeting
April 20th	Meeting
May	Social

SUNCOAST ESTATE PLANNING COUNCIL,

- 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
www.suncoastepc.org

**SUNCOAST
ESTATE
PLANNING
COUNCIL, INC.**

—Membership—

- ◇ Associate Member
- ◇ Attorneys
- ◇ Certified Financial Planners
- ◇ Certified Public Accountants
- ◇ Charitable Organization Executives [501(c)(3)]
- ◇ Chartered Financial Analyst
- ◇ Chartered Life Underwriters
- ◇ Trust Company, Division/Department Employees
- ◇ Chartered Financial Consultants
- ◇ Accredited Estate Planners
- ◇ Emeritus (Retired)

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



SUNCOAST ESTATE PLANNING COUNCIL, INC.

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

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.

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 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 \$275.00 (Associate Members are \$300) for a complete fiscal year (June–May). Members joining during the year are charged based on the following sliding scale:

Sept.–Nov. = \$275.00

Dec. –Feb. = \$205.00

Mar. –May = \$75.00

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

TO JOIN

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.

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

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

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:

1. Length of time acquainted with applicant: _____.
2. Applicant is / is not a member of my firm.
3. Remarks:

I recommend approval of the above applicant and am pleased to sponsor him/her for membership.

Signature of Sponsor

Sponsor's name (please print)

Sponsor's firm and telephone number

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

QUALIFICATIONS FOR MEMBERSHIP: Those persons who make contributions to this 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:

- | | |
|---|--|
| 1. Attorney at Law | 8. Accredited Estate Planner |
| 2. Trust Company/Division/Department Employee | 9. Emeritus – (Retired from any of the above mentioned designations) |
| 3. Chartered Life Underwriter | |
| 4. Chartered Financial Consultant | |
| 5. Certified Public Accountant | |
| 6. Charitable Organization Executive | |
| 7. Certified Financial Planner | |