Fox Valley Estate Planning Council
P.O. Box 7191 · Appleton, WI 54912
FVEPC2018@gmail.com

August 1, 2025

Dear Potential Member:

Thank you for your interest in the Fox Valley Estate Planning Council! We are delighted that you are considering membership in our association and look forward to welcoming you as a new member very soon.

FVEPC is a diverse, multi-disciplinary membership organization comprised of those who are significantly engaged in the field of estate planning. While a gateway degree or designation is typically required, others with substantial work experience in the estate planning or related fields may be considered for regular membership at the discretion of the Council Officers. Our core belief is that the client is best served by the team approach to estate planning. As a result, we admit to membership Certified Public Accountants, Chartered Life Underwriters, Chartered Financial Consultants, Certified Financial Planners, Trust Officers, Chartered Financial Analysts, Certified Wealth Strategists, Chartered Advisors in Philanthropy, those with a Master of Science in Financial Services, or an attorney licensed to practice law in the State of Wisconsin.

FVEPC is a member council of the National Association of Estate Planners & Councils, the association of choice for estate planning professionals. Spanning the entire United States, NAEPC boasts more than 270 estate planning councils with an estimated 30,000 individual members and provides a national forum for networking an education.

The benefits of membership are many! Monthly educational programs, including lunches, from field experts, an excellent in-person and virtual networking environment, member discount programs, access to alternative educational opportunities, and online visibility, just to name a few! You are encouraged to visit our website for additional information on the various opportunities – www.foxvalleyepc.org.

When submitting your application, please make sure to complete it in its entirety and to include a resume or CV. You are also welcome to submit a brief statement supporting your involvement in the estate planning community, should you wish. A sponsor is required and that person should be a current member of the council. Applications are typically processed within 3 weeks of receipt and you will receive an email or a letter in the postal mail after the application has been processed. Payment will be requested after application is approved.

Please contact any of the officers with any questions about the council or the application process. Please let us know how we can help!

Best wishes,
The Fox Valley Estate Planning Council Officers

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APPLICATION FOR REGULAR MEMBERSHIP · ANNUAL DUES $135.00

FULL NAME: _____ **DATE:** _____

PROFESSIONAL DEGREES / DESIGNATIONS HELD (check all that apply):
☐ Atty ☐ CPA ☐ CLU® ☐ ChFC® ☐ AEP® ☐ CFA ☐ CFP® ☐ CTFA ☐ CWS® ☐ CAP® ☐ MSFS

☐ Other, please list: _____

WHAT IS YOUR PRIMARY PROFESSIONAL DISCIPLINE? (choose one):
☐ attorney ☐ accountant ☐ trust officer
☐ insurance professional ☐ financial planning professional

☐ Other, please list and explain: _____

PRESENT EMPLOYER: _____

BUSINESS ADDRESS: _____

BUSINESS CITY, STATE & ZIP CODE: _____

BUSINESS PHONE: _____ **CELL:** _____

EMAIL: _____

WEBSITE FOR ONLINE POSTING: http://www. _____

EDUCATIONAL/PROFESSIONAL BACKGROUND – All applicants, please attach resume, CV, or additional statement.

Please include any additional information you feel would be helpful here:

_____

YEARS OF PRACTICE: _____

PLEASE SUBMIT YOUR APPLICATION & RESUME OR CV TO E-MAIL OR MAILING ADDRESS ABOVE.

I affirm that I am interested in and primarily engaged in Estate Planning or related fields and that the foregoing statements are true. I agree, if elected to membership, to abide by the Constitution, Rules and Regulations of the FVEPC and to support its high ethical standards. A new member, as a prerequisite of regular membership, shall be a Certified Public Accountant, Chartered Life Underwriter, Chartered Financial Consultant, Certified Financial Planner®, Trust Officer, Chartered Financial Analyst, Certified Wealth Strategist®, Chartered Advisor in Philanthropy®, Master of Science in Financial Services, or Attorney licensed to practice law in the State of Wisconsin. In addition, persons who are in the process of attaining any of the aforementioned certifications and/or has substantial work experience in the estate planning or related fields may be considered for regular membership at the discretion of the Council Officers.

Recommended by:

_____
sponsor signature (sponsor must be a current EPC member)

_____
applicant signature

_____
print sponsor name for legibility

**The FVEPC Officers may rely on the information contained in a potential member's membership application without independent verification. The Officers reserves the right to revoke or terminate a person's membership in the Corporation if (a) the person ceases to qualify for membership at a particular level or (b) it is determined that the person significantly misrepresented his or her credentials on the membership application.*

Approval _____ *Acceptance Date* _____