

HOUSTON BUSINESS & ESTATE PLANNING COUNCIL

2017 Membership Application

Deadline: January 31, 2017

NAME _____ DATE OF BIRTH _____

BUSINESS NAME _____

ADDRESS _____

ADDRESS _____

PHONE _____ FAX _____ EMAIL _____

Years Designation Obtained

Your Professional designation or license must have been obtained prior to September 1, 2011 in order to qualify for membership.

Attorney	_____
CPA	_____
CLU	_____
ChFC	_____
CFP	_____
CFA	_____
CBVE-ASA, CVA, AVA, CBA, CPA/ABV	_____
Trust Officer	_____

In the past five years, what percentage of your time have you spent in the following areas:

_____ % in Business Planning
_____ % in Estate Planning
_____ % in Probate
_____ % in Administration of Estate & Trusts
_____ % in Related Tax Matters
_____ % in Related Valuation Services

Please attach:

- Your resume
- 3 Letters of Recommendation from existing Council members
 - Attached
 - Will be sent shortly
- Brief explanation of why you wish to become a member of the HBEPC

Submit applications to:

Lauren G. Doughty
Locke Lord LLP
2800 JPMorgan Chase Tower
600 Travis
Houston, TX 77002
Telephone: 713-226-1522
Fax: 713-223-3717
ldoughty@lockelord.com