**HOUSTON BUSINESS & ESTATE PLANNING COUNCIL**

**2020 Membership Application  
Deadline: February 7, 2020**

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, 2014 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:

Bryan A. Phillips

Ytterberg Deery Knull LLP

3737 Buffalo Speedway, Suite 1500

Houston, TX 77098

Telephone: 713.980.7707

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