

**HOUSTON BUSINESS & ESTATE PLANNING COUNCIL**

**2019 Membership Application**

**Deadline: February 8, 2019**

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, 2013 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 – See guidelines
  - Attached
  - Will be sent shortly
- Brief explanation of why you wish to become a member of the HBEPC

Submit applications and references via email to:

Terri Siegel  
[terri.siegel@rsmus.com](mailto:terri.siegel@rsmus.com)  
713-385-4278