

HOUSTON BUSINESS & ESTATE PLANNING COUNCIL
2019 MEMBERSHIP GUIDELINES

The Houston Business and Estate Planning Council (the “HBEPCC”) maintains an active membership of approximately 150 persons, with a limit on the number of active members in each of the following four categories as determined annually by the Board of the HBEPCC:

- (1) Attorneys,
- (2) Certified Public Accountants,
- (3) Chartered Life Underwriters, Chartered Financial Consultants, Certified Financial Planners/Consultants, Chartered Financial Analyst and Business Valuation Experts with one or more of the following designations: ASA, CVA, AVA, CBA, CPA/ABV.
- (4) Trust Officers of a bank or trust company authorized to do business in the State of Texas.

Applicants for membership should have:

- (1) Been designated an attorney, certified public accountant, chartered life underwriter, chartered financial consultant, certified financial planner/consultant, chartered financial analyst, business valuation expert with one or more of the following designations: ASA, CVA, AVA, CBA, CAP/ABV, or trust officer for at least six years.
- (2) Spent at least 40% of their time in at least three of the last five years (one of which must be the most recent) in at least one of the following activities:
 - * Business Planning
 - * Estate Planning
 - * Probate
 - * Administration of Estates and Trusts
 - * Tax Matters Incident Thereto
 - * Valuation Services
- a. Provide a letter to the Board Membership Chair requesting consideration for membership and resume of your business background, degrees, designations, employment history, etc. Include letters of recommendation from three existing HBEPCC members. At least one of these letters must come from someone in a professional category other than your professional category. At least one of these letters must come from someone with a different employer than your employer.
- (3) Provide a current resume and a brief explanation (in your cover letter or e-mail) of why you wish to become a member of the HBEPCC.

For questions or more information, please contact Terri Siegel at terri.siegel@rsmus.com or 713-385-4278