

HOUSTON BUSINESS & ESTATE PLANNING COUNCIL
2024 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

For questions or more information, please contact the Board Membership Chair, Jon Adinolfi, at jon.adinolfi@rsmus.com or (713) 625.3521