

**HOUSTON BUSINESS & ESTATE PLANNING COUNCIL**

**2024 MEMBERSHIP APPLICATION**

**Deadline for all materials including recommendation letters: February 29, 2024**

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, 2017 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 resumé**
- **3 Letters of Recommendation from existing Council 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.
- **Brief explanation of why you wish to become a member of the HBEPC,** addressed to the Board Membership Chair. Please include your qualifications (business background, degrees, designations, employment history, etc.).

Submit applications to the Board Membership Chair:

Jon Adinolfi  
RSM US LLP  
1330 Post Oak Blvd, Suite 2400  
Houston, TX 77056  
Telephone: 713.625.3521  
jon.adinolfi@rsmus.com