

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
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Houston, TX 77056
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jon.adinolfi@rsmus.com