

HOUSTON BUSINESS & ESTATE PLANNING COUNCIL

2026 MEMBERSHIP APPLICATION

Deadline for all materials including recommendation letters: February 28, 2026

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, 2019 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:

Paul D. Strug
WKPZ, P.C.
24 Greenway Plaza, Suite 2050
Houston, TX 77046
Telephone: 713.961.9045
HBEPCmembershipchair@gmail.com

www.HBEPC.org