

HOUSTON BUSINESS & ESTATE PLANNING COUNCIL

2015 Membership Application

Deadline: February 28, 2015

NAME _____ DATE OF BIRTH _____

BUSINESS NAME _____

ADDRESS _____

ADDRESS _____

PHONE _____ FAX _____ E-MAIL _____

Years Designation Obtained

Your Professional designation or license must have been obtained prior to September 1, 2009 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

Please attach:

- Your resume
- 3 Letters of Recommendation from existing Council members
 - Attached
 - Will be sent shortly
- Brief explanation of why you wish to become a member of the HBEPC

Submit applications to:

Melinda L. McAlister
U. S. Trust, Bank of America
700 Louisiana St., 6th Floor
Houston, TX 77002
Office Phone: (713) 247-7411
Fax: (713) 247-7878
Melinda.mcalister@ustrust.com