

**HOUSTON BUSINESS & ESTATE PLANNING COUNCIL**

**2016 Membership Application**

**Deadline: January 31, 2016**

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, 2010 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:

Jeff Shkolnick  
Texas Advantage Insurance Brokerage  
6363 Woodway Suite 710  
Houston, TX 77057  
Office Phone: (713) 532-1000  
Fax: (713) 532-1199  
[Jeff@texas-advantage.com](mailto:Jeff@texas-advantage.com)