



**PALM BEACH COUNTY ESTATE PLANNING COUNCIL, INC.  
2024-2025 MEMBERSHIP APPLICATION FORM**

**Dues \$425.00**

All members must be actively practicing in the family wealth or estate planning field and be current in their annual dues.

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Mobile\*: \_\_\_\_\_ Email: \_\_\_\_\_

Sponsoring member (new applicants): \_\_\_\_\_

\*Mobile number will only be used for text notification if a meeting is canceled for any reason and will not be published in the online membership directory

Please select one of the following categories of which you will be categorized:

- |                                                  |                                                  |                                                   |
|--------------------------------------------------|--------------------------------------------------|---------------------------------------------------|
| <input type="checkbox"/> Accounting Professional | <input type="checkbox"/> Non-Profit Professional | <input type="checkbox"/> Appraisal/Advisory       |
| <input type="checkbox"/> Attorney                | <input type="checkbox"/> Insurance Professional  | <input type="checkbox"/> Real Estate Professional |
| <input type="checkbox"/> Care Management         | <input type="checkbox"/> Investment Advisor      | <input type="checkbox"/> Student                  |
| <input type="checkbox"/> Financial Advisor       | <input type="checkbox"/> Trust Officer           |                                                   |

**BENEFITS OF MEMBERSHIP**

- Outstanding networking with members of multiple disciplines at every meeting
- An Impressive Variety of Speakers, Topics, and Educational Opportunities
- Attendance at our monthly Dinners and Breakfast Meetings included
- Opportunity to submit an article for the Annual Estate Planning Supplement in the Palm Beach Daily News
- Your name and contact information in the PBCEPC directory in Palm Beach Daily News Supplement
- Your name and firm information in a PBCEPC advertisement to be placed in the Palm Beach Post
- Biography, headshot and listing by last name AND by category on our online directory at [www.pbcepc.org](http://www.pbcepc.org)
- Networking not only with members of our Estate Planning Council, but also with other local associations servicing Palm Beach County and outlying areas
- Social media exposure through Council's Facebook and LinkedIn postings

**July 2024 - June 2025 Dues Payment Information**

Amount enclosed: \$ \_\_\_\_\_

Please select one of the following forms of payment: Check \_\_\_\_\_ Visa \_\_\_\_\_ Mastercard \_\_\_\_\_

To pay by credit card on the Council's fully-integrated online secure payment processing platform, go to <http://www.pbcepc.org/members/renewal>

Mail or email your membership form with payment to:  
Palm Beach County Estate Planning Council  
6671 W. Indiantown Road, Ste. 50-194 • Jupiter • Florida 33458  
Tel: (561) 714-2360 • Email: [admin@pbcepc.org](mailto:admin@pbcepc.org)