

### Contact Information:

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

Organization: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

### 1) Attorneys:

a) I am a member in good standing of the \_\_\_\_\_ Bar Association.

I was admitted to practice in Washington in \_\_\_\_\_.

b)  I am  I am not (check one) admitted to practice before the Tax Court.

c) I am a  partner  principal  employee (check one) of \_\_\_\_\_ (firm).

### 2) Accountants:

a) I am a member in good standing of the \_\_\_\_\_ Chapter of the \_\_\_\_\_ Society of CPAs.

I have practiced accounting for \_\_\_\_\_ years.

b)  I am  I am not (check one) enrolled to practice before the Treasury Department.

c) I am a  partner  principal  employee (check one) of \_\_\_\_\_ (firm).

### 3) Life Underwriters / Financial Consultants / Financial Planners:

a) I am a member in good standing of the \_\_\_\_\_ (local professional organization).

b) I have been a  CLU  ChFC  CFP (check one) for \_\_\_\_\_ years and received my designation in \_\_\_\_\_.

c) I am an  agent  general agent  partner  principal  employee (check one) of \_\_\_\_\_ (company).

### 4) Trust Officers:

a) I am a Trust Officer at \_\_\_\_\_ and have been a Trust Officer for \_\_\_\_\_ years.

### 5) Other (Candidates for "At Large" membership):

a) I am a \_\_\_\_\_, and I have the following professional designations \_\_\_\_\_

I have been actively engaged in estate planning for \_\_\_\_\_ years. My principal place of business is in \_\_\_\_\_.

Please briefly describe your experience / interest and provide any comments you wish. \_\_\_\_\_

### Recommended by:

1. \_\_\_\_\_

TEPC Member

2. \_\_\_\_\_

TEPC Member

### Signed:

\_\_\_\_\_  
Applicant