Santa Barbara Estate Planning Council

# Associate Membership Application

**MEMBERSHIP CLASSIFICATION:**

[ ]  **Certified Public Accountant** [ ]  **Certified Financial Planner** [ ]  **Trust Officer** [ ]  **Attorney**

[ ]  **Certified Life Underwriter** [ ]  **Certified Licensed**

**CANDIDATE:** Click or tap here to enter text.

**AFFILIATION (Firm, Bank, Agency, etc.):** Click or tap here to enter text.

**ADDRESS:** Click or tap here to enter text.

**PHONE:** Click or tap here to enter text. **FAX:** Click or tap here to enter text. **EMAIL:** Click or tap here to enter text.

**QUALIFICATIONS (Please include experience in estate planning activities):**

Click or tap here to enter text.

[ ]  **Minimum 2 years’ experience in estate planning activities** [ ]  **Additional Information attached**

I hereby nominate the following candidate for full membership to the Santa Barbara Estate Planning Council.

 Click or tap here to enter text. Click or tap here to enter text.

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 *(Member’s Signature and Classification)*

I (We), member(s) of the SBEPC, hereby endorse this nomination. \*

 Click or tap here to enter text. Click or tap here to enter text.

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*\*Only one endorsement is needed in addition to that of the proposing member if the proposing member is one of the candidate’s classification, otherwise two endorsements from the candidate’s classification are needed.*

Membership procedures:

1. Member making the nomination obtains application from Secretary.
2. Member making the nomination forwards the completed application to the non-officer board member representing the candidate’s classification.
3. The non-officer member has the responsibility to circulate the candidate’s application by mail to all members of the proposed candidate’s classification. Membership is automatic 10 days after the mailing is sent unless two or more members responded negatively to the board member within the 10 days.
4. In the absence of negative votes, the circulating board member should notify the member making the proposal and the Secretary of the candidate’s election.
5. Please note that Associate Members are not eligible to vote, sponsor new members or be a member of the Board of Directors or an Officer of the Santa Barbara Estate Planning Council.