
**THE ESTATE PLANNING COUNCIL
OF CLEVELAND**

2001 Crocker Road, Suite 510 • Westlake, OH 44145
(216) 696-1228 • Fax: (216) 696-2582
email: admin@epccleveland.org • website: www.epccleveland.org

September 1, 2026

Dear Potential Member:

Thank you for your interest in the Estate Planning Council of Cleveland! We are delighted that you are considering membership in our association and look forward to welcoming you as a new member very soon.

EPC Cleveland is a diverse, multi-disciplinary membership organization comprised of those who are significantly engaged in the field of estate planning. While a gateway degree or designation is typically required, others with substantial work experience in the estate planning or related fields may be considered for regular membership at the discretion of the Board of Trustees. Our core belief is that the client is best served by the team approach to estate planning. As a result, we admit to membership Certified Public Accountants, Chartered Life Underwriters, Chartered Financial Consultants, Certified Financial Planners, Trust Officers, Chartered Financial Analysts, Certified Wealth Strategists, Chartered Advisors in Philanthropy, those with a Master of Science in Financial Services, or an attorney licensed to practice law in the State of Ohio.

EPC Cleveland is a member council of the National Association of Estate Planners & Councils, the association of choice for estate planning professionals. Spanning the entire United States, NAEPC boasts more than 270 estate planning councils with an estimated 30,000 individual members and provides a national forum for networking and education.

The benefits of membership are many! Monthly educational programs, including lunches and breakfasts, from field experts, an excellent in-person and virtual networking environment, a mentorship program, member discount programs, access to alternative educational opportunities, and online visibility, just to name a few! You are encouraged to visit our website for additional information on the various opportunities – www.epccleveland.org.

When submitting your application, please complete it in its entirety and include a summary of professional experience (e.g. one or more of the following: professional bio, resume, CV, and/or LinkedIn page along with payment. You are also welcome to submit a brief statement supporting your involvement in the estate planning community, should you wish. A current EPC member sponsor is recommended but not required. If you are unable to secure a sponsor, an additional review will take place, but it does not preclude you from applying. Applications are typically processed within 3 weeks of receipt and you will receive a letter in the postal mail after the application has been processed.

Our office is always available to you at admin@epccleveland.org or 216-696-1228 for questions about the council or the application process. Please let us know how we can help!

Best wishes,
The Estate Planning Council of Cleveland Board of Directors



ESTATE PLANNING COUNCIL OF CLEVELAND

ABOUT US...

- Our core belief is that the **client is best served by the team approach** to estate planning.
- EPC Cleveland is a **diverse, multi-disciplinary membership organization** of about 375 members who are significantly engaged in the field of estate planning; including attorneys, accountants, bankers & trust officers, financial planners, insurance agents, appraisers and representatives from various charitable organizations.
- EPC Cleveland is a **member council of the National Association of Estate Planners & Councils (NAEPC)**, which boasts more than 270 estate planning councils with an estimated 30,000 individual members across the US.
- EPC Cleveland has been named a **NAEPC Council of Excellence** four years in a row for our efforts to grow our programs and services and provide an exceptional member experience.

BENEFITS INCLUDE...

- **Educational programs** offered monthly in person and virtually presented by local and national field experts. Continuing education in relevant fields offered.
- Excellent **networking** environment.
- A **mentorship program** called "EPC Guidestar" for experienced and newer professionals looking to connect and network.
- Access and online visibility in **membership directory**. Membership list published annually in special Estate Planning Supplement in *Smart Business Magazine Online*.
- Member **discount programs**.

NEXT STEPS...

- Learn more at www.epccleveland.org.
- Apply for membership.
- Join us at an upcoming event! Guests are always welcome!

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APPLICATION FOR REGULAR MEMBERSHIP • ANNUAL DUES \$150.00

FULL NAME: _____ **DATE:** _____

PROFESSIONAL DEGREES / DESIGNATIONS HELD (check all that apply):

___ Atty ___ CPA ___ CLU® ___ ChFC® ___ AEP® ___ CFA ___ CFP® ___ CTFA ___ CWS® ___ CAP® ___ MSFS

___ Other, please list: _____

WHAT IS YOUR PRIMARY PROFESSIONAL DISCIPLINE? (choose one):

___ attorney ___ accountant ___ trust officer
___ insurance professional ___ financial planning professional ___ planned giving professional

___ Other, please list and explain: _____

PRESENT EMPLOYER: _____

BUSINESS ADDRESS: _____

BUSINESS CITY, STATE & ZIP CODE: _____

BUSINESS PHONE: _____ **CELL:** _____

EMAIL: _____

WEBSITE FOR ONLINE POSTING: http://www. _____

EDUCATIONAL/PROFESSIONAL BACKGROUND – All applicants, please include a summary of professional experience (e.g. one or more of the following: professional bio, resume, CV, and/or LinkedIn page).

Please include any additional information you feel would be helpful here:

PRACTICE START YEAR: _____ **DATE OF BIRTH:** _____

PAYMENT: I am including the dues payment of \$150.00, which I understand will be returned to me if this application is not acted upon favorably.

___ Check Enclosed or ___ Charge my Visa/MC/Amex # _____ Exp. Date _____

For your safety, please mail or fax the application and supplemental information if paying with a credit card.

I affirm that I am interested in and primarily engaged in Estate Planning or related fields and that the foregoing statements are true. I agree, if elected to membership, to abide by the Constitution, Rules and Regulations of the Estate Planning Council of Cleveland and to support its high ethical standards. A new member, as a prerequisite of regular membership, shall be a Certified Public Accountant, Chartered Life Underwriter, Chartered Financial Consultant, Certified Financial Planner®, Trust Officer, Chartered Financial Analyst, Certified Wealth Strategist®, Chartered Advisor in Philanthropy®, Master of Science in Financial Services, or Attorney licensed to practice law in the State of Ohio. In addition, persons who are in the process of attaining any of the aforementioned certifications and/or has substantial work experience in the estate planning or related fields may be considered for regular membership at the discretion of the Board of Trustees.

applicant signature

Recommended by:

(A current EPC member sponsor is recommended but not required. If you are unable to secure a sponsor, an additional review will take place, but it does not preclude you from applying or being accepted as a member.)

sponsor signature (sponsor must be a current EPC member)

print sponsor name for legibility

The Membership Committee and Board of Directors of the Estate Planning Council of Cleveland may rely on the information contained in a potential member's membership application without independent verification. The Board of Trustees reserves the right to revoke or terminate a person's membership in the Corporation if (a) the person ceases to qualify for membership at a particular level or (b) it is determined that the person significantly misrepresented his or her credentials on the membership application.

Approval _____ Acceptance Date _____