

Applicant Qualifications

Name: _____ Category: _____

1. How long have you been in your current profession? _____ years.
2. How long have you been in an estate planning practice? _____ years.
3. What percent of your time is involved in estate planning (see **addendum**)? _____ %.

4. Education (school, degree):

Undergraduate: _____

Advanced Degrees: _____

5. Professional organization members: (***Use separate sheet of paper if necessary for all answers***)

6. Summarize your estate planning continuing education program attendance over the past 3 years (include location and hours):

Sponsorship

Sponsors have responsibility to ascertain that the applicant meets membership requirements set forth above.

One Sponsor from a Different Category

I recommend the above candidate for membership in the Estate Planning Council of Seattle and confirm and certify he/she is actively engaged in the field of estate planning, working in a different membership category than mine. We do not work in the same firm, office or for the same employer.

Signed:

(Sponsor signature)

(Print name and category)

Two Sponsors from the Same Category

We recommend the above candidate for membership in the Estate Planning Council of Seattle and confirm and certify he/she is actively engaged in the field of estate planning, working in our membership category. Neither of us works in the same firm, office or for the same employer as the candidate.

Signed:

(Sponsor signature) _____

(Print name and category) _____

Signed:

(Sponsor signature) _____

(Print name and category) _____

Committee Recommendation

Member Review Committee Recommendation: Accept Decline Date: _____

Committee Chair: _____

Committee Comments: _____

Executive Committee Decision: Accept Decline Date: _____

Addendum
Estate Planning Activities Defined

- ↵ Planning for the disposition of property
- ↵ The protection of assets from estate, gift and income taxation
- ↵ Providing or protecting assets at death to enhance liquidity to pay for the costs of transferring assets to others or for accomplishing other goals.
- ↵ Planning for and/or dealing with beneficiaries of trusts, other entities, or financial instruments such as life insurance and annuities.
- ↵ The management of trusts or other entities having the effect of protecting assets for others and/or directing the use of assets as determined by the individual(s) who established those trusts or other entities to benefit their families, charities or for other purposes.

Return entire form to: Marcia Bartlett, Council Administrator, Estate Planning Council of Seattle, Post Office Box 21609, Seattle, Washington 98111-3609; Telephone 206-285-4066; Fax 206-284-0342