

Hawaii Estate Planning Council

Member Application

Date: _____

Name: _____ Nickname: _____

Company Name: _____ Position Title: _____

Mailing Address: _____

City: _____ Zip: _____

☐ Attorney

☐ Trust Officer

☐ CPA

☐ CLU

☐ ChFC

☐ CFP

☐ CFA

☐ Associate Member *

Phone: (808) _____

Fax: (808) _____

Email: _____

Signature: _____

We certify that the above applicant is qualified to be a member of the Hawaii Estate Planning Council.
*(For Associate Membership only – please describe on following page how this member is involved in Estate Planning)

SPONSOR: _____
(Signature)

PRINT NAME: _____

SPONSOR: _____
(Signature)

PRINT NAME: _____

Membership Fee

INITIATION FEE: \$50.00 ANNUAL FEE \$275.00

Please fill in and mail to:

HAWAII ESTATE PLANNING COUNCIL
P. O. Box 1227
HONOLULU, HAWAII 96807

For questions only call:

TONY LIM
Phone: (808) 554-7970/ Fax: (888) 815-4595
Email: TONY@TONYLIMCPA.COM

*Please be sure to enclose your check payable to: **Hawaii Estate Planning Council** in the amount of:*
\$300.00

HAWAII ESTATE PLANNING COUNCIL POLICY

REGULAR MEMBERSHIP: The Hawaii Estate Planning Council is a professional association of Attorneys, Certified Financial Planners, Certified Public Accountants, Chartered Financial Analysts, Chartered Financial Consultants, Chartered Life Underwriters and Trust Officers. Regular membership is restricted to qualified professionals in these categories.

CORPORATE MEMBERSHIP: A Corporate Membership status may be held by any firm having five (5) or more Council members in a given year. Although the firm must designate five (5) qualified individuals as Council members, the Corporate Membership advantage is that the Council will allow substitution of members for any Council meeting or event.

ASSOCIATE MEMBERSHIP: Candidates for Associate Membership must have substantial involvement in estate planning during three of the past five years. Associate Members will not have voting rights, be able to hold office or sponsor new members. Associate Members' membership renewal is subject to Board of Directors approval annually.

SUBSTITUTIONS: No substitution of members is allowed at any meeting or event unless the member is under a Corporate Membership. All attendees, other than members, will be charged a \$40 guest fee for lunch and \$50 guest fee for dinner.

GUEST FEES: The current guest fee is \$40 for lunch and \$50 for dinner. Since it is costly and time consuming to send out billing for guest charges, all guest charges must be paid in advance by cash or check and sent in with the reservation form.

NOTE: New members joining after August of any year, will pay \$100.00 to cover the annual banquet, the \$50.00 initiation fee, and the guest fee for each remaining lunch or dinner meetings.