

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 applicant is substantially involved in Estate Planning)

SPONSOR: _____ PRINT NAME: _____
(Signature)

SPONSOR: _____ PRINT NAME: _____
(Signature)

Membership Fee

INITIATION FEE: \$50.00 ANNUAL FEE \$300.00

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:
\$350.00*

NOTE: New members joining after August of any year, will pay \$175.00 to cover the annual banquet and remaining meetings, and the \$50.00 initiation fee.

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. Members belonging to Corporate Member firms may be substituted for other individuals for any meeting or event, provided said individuals also belong to the Corporate Member firm.

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.

Associate Member Applicant Statement:

SPONSOR: _____ PRINT NAME: _____
(Signature)

SPONSOR: _____ PRINT NAME: _____
(Signature)

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 \$50 guest fee for lunch.

GUEST FEES: The current guest fee is \$50 for lunch if paid by check. Guest fees can now be paid online (\$51.50) via credit card or PayPal. Since it is costly and time consuming to send out billing for guest charges, all guest charges must be paid in advance when registering online or sent in with the reservation form.

NO SHOW POLICY: HEPC has a no-show policy that states that members will be charged a no-show fee if they do not show up to an event to which they RSVP'd. In an effort to be as fair and objective as possible, this is a "no exceptions" policy. Although there may be circumstances out of your control that may result in non-attendance, HEPC still gets charged the fee as if you attended the event. If you RSVP to an event, you have up until the RSVP deadline to cancel your RSVP. Similarly, guest fees will be charged (and not refunded) if a guest does not show up to an event. The member responsible for said guest will be invoiced for the guest fee if it was not pre-paid. We appreciate your courtesy to other members and their guests by not coming if you have COVID or feel ill in any way. This policy is not meant to encourage people to attend if they are ill or contagious.

WALK-IN POLICY: RSVP's are required for HEPC meetings and events because we need to RSVP to the venue in which the meeting or event is being held. Please confirm you have RSVP'd prior to coming to the HEPC meeting or event. If you RSVP online, you will receive an automatic email confirmation. If you do not receive an email confirmation, you can also check your RSVP on the website. If you come to an HEPC meeting or event without RSVP'ing, a \$25 member walk-in fee will be charged if there is a seat available and you decide to stay. We will not accept guest walk ins. This policy does not guarantee that a seat will be available if you walk in without RSVP'ing.