

The Tampa Bay Estate Planning Council is an interdisciplinary organization for professionals involved in estate planning. As an affiliate of the National Association of Estate Planners & Councils, we are focused on establishing and monitoring the highest professional and educational standards as well as increasing public awareness of the importance of estate planning.

Our Council strives to foster understanding of the proper relationship between the functions of the Life Underwriter, Trust Officer, Attorney, Accountant, CFP® professional and any other party or parties having to do with estate planning. We encourage the co-operation and interaction of persons comprising the estate planning team.



The Council was officially organized in 1959. Since that time our membership has grown to over 200 strong and is the largest in the state of Florida. One of the unique strengths of the

Council is that each officer is from a different discipline. This provides equal representation and adds to the dynamics of the organization.

Annual dues include the cost of all meetings, dinners and the social event. Monthly meetings are usually the third Wednesday of the month. Networking begins at 5:30 pm, followed by the dinner and program at 6:00 pm. December includes a special banquet for all members and their spouse or guest.

## 2011-2012 Schedule

September 21, 2011

October 21, 2011  
*Alice Rokahr, JD*  
*Wells Fargo Legacy Trust*

November 16, 2011

December 2, 2011  
*Holiday Social*  
*Columbia Restaurant*

January 18, 2012

February 15, 2012

March 21, 2012

April 18, 2012

May 16, 2012

The Tampa Bay Estate Planning Council, Inc.  
12157 W Linebaugh Ave PMB 312  
Tampa, FL 33626-1732  
(813) 855-1017 phone  
(813) 830-6113 fax  
info@tbepc.org  
www.tbepc.org

# The Tampa Bay Estate Planning Council, Inc.



The Professional Organization  
for the Professional

## Membership Disciplines

- Attorneys
- Certified Public Accountants
- Insurance Professionals
- Trust Officers
- CFP® Professionals

A member of the  
National Association  
of Estate Planners & Councils

**Membership Application The Tampa Bay Estate Planning Council, Inc. (please print)**

**Contact Information**

Name \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_

Do not publish Fax  Do not publish email

Have you ever been a member of this Council?  Yes  No If yes, last year of membership \_\_\_\_\_

**Membership Discipline (please select one)**

- Attorney & member of the Florida Bar  
Year admitted to Florida Bar \_\_\_\_\_
- Certified Public Accountant (CPA)
- Trust Officer of a Registered Regulated Trust Dept.
- CFP® professional Year certified \_\_\_\_\_
- Insurance, applying as
  - Chartered Life Underwriter (CLU)
  - Chartered Financial Consultant (ChFC)
  - MDRT Qualifying or Life Member

Signature of Applicant \_\_\_\_\_

Print Name \_\_\_\_\_

**Required Recommendations**

- ◆ One TBEPC member from the same member discipline, and
- ◆ One TBEPC member from a different member discipline, and
- ◆ A letter of recommendation from any TBEPC member.

**Recommend by**

Member signature \_\_\_\_\_

Print Name \_\_\_\_\_

Discipline \_\_\_\_\_

Member signature \_\_\_\_\_

Print Name \_\_\_\_\_

Discipline \_\_\_\_\_

Send completed application, letter of recommendation and check for \$250 made payable to

Tampa Bay Estate Planning Council to  
**The Tampa Bay Estate Planning Council, Inc.**  
**12157 W Linebaugh Ave PMB 312**  
**Tampa, FL 33626-1732**