



It is time to renew your Membership..... Message From the President

Our Council continues to thrive and has become THE organization in Boston to join if you are involved in the estate planning market. We have achieved this by focusing our efforts on our core competencies... providing our members with important, timely educational programs and opportunities to enhance their practices by meeting other professionals from complimentary disciplines and developing relationships that benefit both.

Your Board of Directors has worked diligently over the summer months to implement a full Calendar of Events that include multiple Roundtable Meetings, a webinar, thought-provoking seminars, and an interesting "Signature Event" in the spring, etc. *Please visit the website to see more details on these and other events.*

Not surprisingly, our success has created an issue which is currently being addressed. Many of our events are sold out leaving some members unable to attend. Unfortunately, getting a large room does not solve the problem. Since many of our events are included in your dues, many members sign up but then aren't able to attend which results in closing out the opportunity for those who do want to attend. We have established a Task Force headed by Kelly Aylward, and their recommendations are currently being reviewed and new procedures will be implemented shortly.

As a reminder we have TWO Members Only Networking Cocktail events that I am sure you will want to attend. Our Kick Off Event is on September 30th and our Holiday Reception is December 8th **so please mark your calendars!**

We continue to make improvements in our website. If you have any suggestions or ideas, your input is always welcomed and appreciated.

The Council is only as strong as its members, and I hope each of you will take a moment to:

- Go online at www.bepc.org and complete the renewal application.
- While you are there, please take a moment and up-date your "Member Profile" and add a picture if you don't already have one displayed.
- And for those of you who have not yet "gone green", you can complete the following 4-Step renewal application.

On behalf of your entire Board of Directors, thank you for the opportunity to continue to build an even stronger, more vibrant Council. I look forward to working with all of you over the coming year.

Tom Bishop 2010/2011 Boston Estate Planning Council President



**2010/2011 BEPC President
Thomas W. Bishop, CLU, AEP**

Full Member

Upon application and acceptance, any Officer of a Trust Company, Attorney, CPA, CLU, CFP®, ChFC, PFS, AEP, CFA, CAP, CTFA, or the holder of a Masters Degree in Business, Finance, Tax, or Accounting **who is directly involved in estate planning** may become a Full Member of the Council, subject to the recommendation of the Membership Committee and vote of the Board of Directors. The application for membership must bear the recommendation of two Full Members, one from the practice area of the applicant and one from a different practice area as determined from time to time by the Board of Directors. Only one recommendation in support of membership may be from a Member with the same employer as that of the applicant. A FULL Member shall have the privilege to vote, sponsor new members, and hold office.

Associate Member

Applicants **whose occupation is directly involved in estate planning but do not have the required degrees and/or credentials** shall be eligible for Associate Membership in the Council upon terms and conditions as set forth by the Board of Directors. The application for membership must bear the recommendation of two Full Members, one from the practice area of the applicant and one from a different practice area as determined from time to time by the Board of Directors. Only one recommendation in support of membership may be from a Member with the same employer as that of the applicant. Associate members cannot vote, sponsor new members or hold office. Associate Members, upon five (5) active years of membership in the Council, shall be eligible for Full Membership upon application, recommendation of the Membership Committee, and a two-third (2/3) vote of the Board of Directors.

Emeritus Member

The Boston Estate Planning Council offers Emeritus Membership status to FULL members of the Boston Estate Planning Council in good standing who have reached their twenty (20) year membership anniversary and age seventy. Individuals may request Emeritus Membership Status by a written letter to the Board of Directors; recommendation by the Membership Committee and election to membership by the Board of Directors at any quarterly Board meeting. Emeritus members cannot vote, sponsor new members or hold office. Emeritus Members may attend all Brown Bags Seminars, Roundtable Breakfasts & Networking Events at no charge and do not pay annual dues. BEPC Emeritus member may attend the educational events and the Annual Estate Planner of the Year Dinner at the member price per event and registration is required.

Student Member

The Boston Estate Planning Council offers Student Membership to full time students. Student Members are eligible for a 50% membership fee reduction for a maximum of 2 years. At the end of year two, Student Members will be required to reapply as Full or Associate Members under those defined guidelines. Individuals may become a Student Member of the Council upon completed application to include a copy of University/College enrollment; payment of dues and; recommendation by the Membership Committee and election to membership by the Board of Directors at any quarterly board meeting. Student members DO NOT require letters of recommendation. Student members cannot vote, sponsor new members or hold office.



The Boston Estate Planning Council
2010/2011 Membership Renewal

DUE: September 30, 2010

**The BEPC Membership Renewal
process DOES NOT require you to
submit letters of recommendation.**

Step one, please complete your membership profile information...

\$275

Date: _____

First name: _____ MI: _____ Last name: _____

Company: _____

Address : _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Website: _____

I have been actively engaged in estate planning for _____ years.

Step two, select your membership category...

I am renewing my membership in the Boston Estate Planning Council as:

A Full Member and affirm that my occupation is directly involved in estate planning.

Full membership at the time of application requires at least one of the following criteria, please check all that apply:

- ___ *Attorney (JD)*
- ___ *CPA (Certified Public Accountant)*
- ___ *CLU (Chartered Life Underwriter)*
- ___ *CFP® (Certified Financial Planner)*
- ___ *ChFC (Chartered Financial Consultant)*
- ___ *PFS (Personal Financial Specialist)*
- ___ *AEP (Accredited Estate Planner)*
- ___ *CFA (Chartered Financial Analyst)*
- ___ *CAP (Chartered Advisor in Philanthropy)*
- ___ *CTFA (Certified Trust and Financial Advisor)*
- ___ *Officer of a Trust Company*
- ___ *Masters degree in Finance, Tax, Accounting or other Business*

An Associate Member and affirm that my occupation is directly involved in estate planning .

___ *I do not hold the required degrees and/or credentials listed above.*

An Emeritus Member.

___ *I am a 20 year FULL member in good standing and have reached age 70.*

A Student Member.

___ *I have attached a copy or verification of my University/College enrollment.*



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Step three, select your practice area...

\$275

Upon renewing your BEPC membership, each member may select only **ONE Practice Area** that best describes his/her area of concentration in estate planning. **This applies to Full and Associate Member renewals only.**

***Practice Areas:**

- Trust Administration*
- Trusts & Estates Law (practicing attorney in a law firm)*
- Life Insurance*
- Wealth Management*
- Planned Giving*
- Accounting*
- Financial Planning*
- Family Office Management*

Step four, submit your annual membership dues payment...

- I would like to renew my annual dues at \$275. All Brown Bag programs and Member Roundtable Breakfasts are included with my annual dues payment.
- I would like to renew my annual dues and take advantage of the prepaid program option called the Early Bird Program for a total of \$475. The Earlybird Program includes the annual dues of \$275 plus the prepaid registration fees of \$200 to ALL seminars offered from September through June. (Annual Awards Banquet not included in this package)
- I would like to renew my EMERITUS membership at NO CHARGE.
- I would like to renew my STUDENT membership at \$137.50

We accept Visa, MasterCard, American Express or Check. Checks should be made payable to: BEPC

Please enclose proper payment and return to:
Boston Estate Planning Council, P.O. Box 500, Hingham, Mass. 02043

Credit card number: _____

Authorized signature: _____

Expiration date: _____

I hereby renew my membership in the Boston Estate Planning Council and agree to conform to the provisions of its Articles of Association. The information I have presented in the application is true and accurate.

Signature: _____

Need some help?

Boston Estate Planning Council Headquarters is ready to help you with your questions, please call 617.266.1919