
BEPC MEMBERSHIP APPLICATION - *TRUST OFFICER*

I hereby apply for membership in the Baltimore Estate Planning Council as a Trust Officer member. I understand that active Trust Officer members shall be currently employed by a trust institution in the trust department.

I am now employed by the trust institution named below, in the trust department, and have been so employed by this institution (or another) since: _____ .

NAME: _____

FIRM: _____

ADDRESS: _____

CITY _____ STATE: _____ ZIP: _____

TELEPHONE: _____ FAX: _____

E-MAIL ADDRESS: _____

YOUR CE INFORMATION (if applicable):

MD Insurance Administration (MIA) License Number: _____

Social Security Number: _____ CFP #: _____

MEMBERSHIP SPONSORS

All applicants for membership as a Trust Officer shall be sponsored by two (2) active Council members, one of whom is an Trust Officer member who is not currently employed by the same trust institution as the applicant at the time the application is filed.

SPONSOR #1: I hereby sponsor the above named applicant for membership

PRINTED NAME: _____

FIRM NAME: _____

SIGNATURE: _____

SPONSOR #2: I hereby sponsor the above named applicant for membership

PRINTED NAME: _____

FIRM NAME: _____

SIGNATURE: _____

ANNUAL DUES OF \$110.00 MUST BE INCLUDED WHEN APPLYING FOR MEMBERSHIP. The BEPC membership year is from July 1 through June 30 of each year. Those applying mid-year will receive a prorated invoice for their first full year.

PAYMENT OPTIONS Check Enclosed or Charge my: Visa MasterCard American Express

Card Number: _____ Expiration Date: _____

Signature on Card: _____ Printed Name as appears: _____

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