

# GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.

[www.gnjepec.org](http://www.gnjepec.org)

## NEW MEMBER APPLICATION FOR 2011-2012

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

Business Address: \_\_\_\_\_

\_\_\_\_\_

Bus. Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

(Print Clearly. Meeting Notices will be sent as an attachment to email)

Cell Phone (Optional) \_\_\_\_\_ Website: \_\_\_\_\_

Primary Field of Practice (check) :  ACCOUNTING  LAW  INSURANCE

FINANCIAL ADVISOR/PLANNER  TRUST ADVISOR  ALLIED PROFESSIONAL

**Note: All information above this sentence will be published on the public GNJEPC website unless you opt out by checking here:**

How did you hear about GNJEPC? \_\_\_\_\_

**REFERRAL** – Please indicate the name of the sponsoring Member. If none, a Committee Member will reach out to you.

\_\_\_\_\_  
\_\_\_\_\_

Educational Background and Work Experience: (Resume Optional): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Estate Planning Experience: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Please describe what you feel you bring to the Council:

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For Continuing Education Credits please CHECK desired credits:

CPA

Attorney

CFP

Insurance

CFP License # \_\_\_\_\_ or Last four digits of SSN \_\_\_\_\_ for CFP

NJ Life Insurance License # \_\_\_\_\_

**CERTIFICATION:**

By signing and submitting this application, the applicant certifies (1) that he/she has practiced estate planning or practiced in a related field for at least 3 of the 5 years prior to this application; (2) that all licenses and or designations, if any, held by applicant are current and in good standing including continuing education requirements; and (3) that he/she agrees to adhere to and respect the ethical standards of his or her own profession and the independence and standards of the other professions and disciplines represented in the Council.

**X** \_\_\_\_\_ Date: \_\_\_\_\_  
Applicant

Annual Dues are \$300 which includes the cost for all ten luncheon meetings. Please print the completed application and sign and date it. Make your check payable to **GREATER NEW JERSEY ESTATE PLANNING COUNCIL, INC.** and mail to:

Timothy G. Parker, CFA  
Regency Wealth Management  
666 Godwin Ave, Ste 210  
Midland Park, NJ 07432