



MILWAUKEE ESTATE PLANNING FORUM, INC.
Dues for 2019 Membership
Amount Due - \$280 (\$330 if payment is received after 1/30/19)

Members who are age 65 or older as of 12/31/2018 are designated as Emeritus members per our By-Laws. Emeritus members are not required to pay annual dues. Instead, Emeritus members may pay \$50 per meeting attended, or they may pay the full 2019 dues of \$280, rather than \$50 per meeting, if they prefer.

Dues can now be remitted via credit card. To pay by credit card: Click on the RSVP for this event. Complete the Event RSVP information boxes and answer any questions. Choose one of the following:

- * Regular Member \$280
* Emeritus Member paying in full \$280
* Emeritus Member paying each meeting
* Pay by Check

Click on appropriate payment method. To pay by credit card Click on "Pay by Credit Card or Paypal". It will then provide a confirmation receipt. You must continue and click on the Paypal icon which will direct you to the site to pay either through a paypal account or by directly entering in your credit card account information.

By completing the informational boxes and answering the questions, you do not need to mail or email Tammy Wishowski the annual dues information form.

You can still remit your dues via check.

Please make your remittance payable to Milwaukee Estate Planning Forum, Inc. and send it together with this statement on or before January 30, 2019 to:

Tammy Wishowski
Scribner Cohen & Co SC
400 E Mason Street, Suite 300
Milwaukee, WI 53202

tawcpa@scribnercohen.com
(414) 271-1700

Emeritus - Pay as You Go: If no payment is submitted through Event RSVP you can still submit the annual dues form by completing the information boxes and answering the questions. Once you submit the information you do not need to mail or email me the annual dues notice. IN ORDER TO REMAIN ON THE MEMBERSHIP ROSTER, YOU MUST EITHER RETURN THIS FORM BY 1/30/19 OR COMPLETE THE EVENT RSVP. FAILURE TO RESPOND WILL RESULT IN REMOVAL FROM THE ROSTER.

Please remember to keep your contact information updated on our website at www.milwaukeeepf.org

Name _____

Email _____

Date of Birth _____

Please check all categories that apply:

- ___ Representative of a trust company or bank trust department
___ Chartered Life Underwriter
___ Attorney
___ Certified Public Accountant
___ Financial Planner
___ Philanthropy
___ Other person actively practicing in the areas of estate planning or employee benefit planning

- [] I am no longer interested in being a member of Milwaukee Estate Planning Forum.
[] I am an Emeritus member (age 65 or older on 12/31/18) who wishes to pay the annual dues of \$280 rather than paying \$50 for each meeting attended (there are 8 meetings).
[] I am an Emeritus member (age 65 or older on 12/31/18) who wishes to pay \$50 per each meeting attended.
[] I have an interest in speaking at a future MEPPF meeting. Please list topic _____

PLEASE REVIEW FEE POLICY ON NEXT PAGE

2019 Milwaukee Estate Planning Forum Fee Policy

1. Guest Fee Policy
 - a. Members will be required to pay a \$50 guest fee each time they bring a guest to a meeting.
 - b. Members of other estate planning councils who are not members of the Milwaukee Estate Planning Forum must pay a \$50 guest fee each time they attend a meeting.
 - c. The guest fee may be increased at the Board's discretion for any meeting at which a national speaker is presenting.
 - d. Guests and members of other estate planning councils are subject to the same Late Fee Policy as members (see below).
2. Late Fee Policy
 - a. Members will be charged a \$20 "late" fee when any of the following events occur:
 - i. Registration after the established deadline
 - ii. Cancellation after the established deadline
 - iii. Failure to attend a meeting without a timely cancellation
 - iv. Attending a meeting without a timely registration
 - b. The established deadline is noon on the Monday that immediately precedes each meeting.
 - c. Each member will be allowed one waiver of the \$20 late fee per calendar year.
3. Collection of Fees
 - a. Guest fees are due by the day of the meeting. They can be mailed in advance to the Treasurer.
 - b. Late fees will be assessed after each meeting by the Treasurer.
 - c. Guest/late fees not timely paid will be added to the member's dues for the subsequent year and must be paid to remain a member in good standing.
 - d. In the event of a Member's mid-year resignation, the Member will receive a pro-rated refund of the Member's dues upon the Member's request and board approval.
4. Emeritus Members
 - a. An Emeritus member is a member who is age 65 or older on December 31 of the preceding year.
 - b. Emeritus members have two payment options regarding annual dues:
 - i. Pay full \$280 dues for the year
 - ii. Pay the \$50 guest fee each time they attend a meeting
 - c. An Emeritus member needs to designate the member's payment choice annually when the member returns his/her dues notice.
5. Registration Table
 - a. A Membership Committee member will serve as host at the registration table for each meeting to greet members, collect payments and monitor sign-in.
 - b. All members must sign-in to verify their attendance; failure to do so could result in the assessment of a late fee.
 - c. All members must also sign-in to obtain the appropriate CE credits.