



National Association of  
Estate Planners & Councils

**MILWAUKEE ESTATE PLANNING FORUM, INC.**  
**Dues for 2022 Membership**  
**Amount Due - \$280**

Please make your remittance payable to **Milwaukee Estate Planning Forum, Inc.** and send it together with the bottom half of this statement on or before January 31, 2022 to:.

Thomas Eling  
Wipfli LLP  
10000 Innovation Drive, Suite 250  
Milwaukee, WI 53226

teling@wipfli.com  
(414) 666-8669

☐ Enclosed is my check for \$280 for 2022 Milwaukee Estate Planning Forum, Inc. membership dues.

**Please remember to keep your current contact info updated on our website at [www.milwaukeeepf.org](http://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  
\_\_\_\_ 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 12/31/21) who wishes to pay the annual dues of \$280 rather than paying \$50 for each meeting attended (there are 8 meetings).

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☐ I have an interest in speaking at a future MEPF meeting. Please list topic \_\_\_\_\_

***2022 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.
  - d. For absences, we will assume that you want to use the waiver, unless we are informed before the event.
3. Collection of Fees
  - a. Guest fees are due by the day of the meeting. They can be paid on line or 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.
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.