



National Association of
Estate Planners & Councils

MILWAUKEE ESTATE PLANNING FORUM, INC.
Prorated Dues for 2023 Membership
Amount Due - \$290

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, 2023 to:.

Jennifer Bogli
Mohr CPAs LLP
10361 Innovation Drive, Suite 150
Milwaukee, WI 53226
jbogli@mohrcpas.com

☐ Enclosed is my check for \$290 for 2023 Milwaukee Estate Planning Forum, Inc. membership dues.

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

Name _____

Email _____

Date of Birth _____ (must include in order to qualify for Emeritus status, if applicable)

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 12/31/22) who wishes to pay the annual dues of \$290 rather than paying \$50 for each meeting attended (there are 8 meetings).
- ☐ I am an Emeritus member (age 65 or older on 12/31/22) who wishes to pay \$50 per each meeting attended.
- ☐ I have an interest in speaking at a future MEPF meeting. Please list topic _____

PLEASE REVIEW FEE POLICY ON NEXT PAGE

2023 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 online or brought to the meeting.
 - 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 prorated 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 \$290 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.