

**MILWAUKEE ESTATE PLANNING FORUM, INC.**  
APPLICATION FOR **EMERGING PROFESSIONALS PROGRAM**

Name \_\_\_\_\_

Present business affiliation \_\_\_\_\_

Office address \_\_\_\_\_

\_\_\_\_\_

Office phone \_\_\_\_\_ Email \_\_\_\_\_

Year of birth: \_\_\_\_\_

I apply for active membership in the Milwaukee Estate Planning Forum, Inc. in the following category

- 1. \_\_\_\_\_ Representative of a trust company or bank maintaining a trust dept.
- 2. \_\_\_\_\_ CLU or ChFC designated life underwriter licensed in Wisconsin
- 3. \_\_\_\_\_ Attorney in good standing with the State Bar of Wisconsin
- 4. \_\_\_\_\_ Certified Public Accountant in good standing with the WICPA
- 5. \_\_\_\_\_ ChFC or CFP
- 6. \_\_\_\_\_ Philanthropy
- 7. \_\_\_\_\_ Other person actively practicing in area of estate planning or employee benefit planning.

Professional Licenses/Numbers: \_\_\_\_\_

I agree to comply with all the articles, by-laws and resolutions of the corporation. I am currently engaged in the following qualifying businesses or professions in Milwaukee County, Ozaukee County, Washington County, Waukesha County or Racine County and have done so for less than two years (give affiliations and dates, or submit attachment):

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

Date: \_\_\_\_\_ Applicant Signature: \_\_\_\_\_

**Procedure.** Applicant should complete and sign the application and return with one (1) letter of recommendation from a current MEPF member addressed to:

**Milwaukee Estate Planning Forum**

**c/o Danila Danesi**

**J.P. Morgan Private Bank**

**111 East Wisconsin Avenue, Floor 22**

**Milwaukee, WI 53202**

**Phone: 414.977.2063**

**Email: [danila.danesi@jpmorgan.com](mailto:danila.danesi@jpmorgan.com)**