

## MILWAUKEE ESTATE PLANNING FORUM, INC. Dues for 2020 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 December 31, 2019 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 2020 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

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 12/31/19) who wishes to pay the annual dues of \$280 rather than paying \$50 for each meeting attended (there are 8 meetings).
- $\Box$  I am an Emeritus member (age 65 or older on 12/31/19) 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

## 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.
  - 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.