

**MILWAUKEE ESTATE PLANNING FORUM, INC.**  
APPLICATION FOR MEMBERSHIP

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 (membership requirements are on page 2):

- 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.

I agree to comply with all the articles, by-laws and resolutions of the corporation. I have maintained a principal office or place of business in Milwaukee, Ozaukee, Washington, Waukesha or Racine County for one year immediately preceding the date of this application, or I am a transferee as an active member of another estate planning council or equivalent organization.

I have actively engaged in the following qualifying businesses or professions during the two consecutive years immediately preceding the date of this application (give affiliations and dates): \_\_\_\_\_

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

Professional specialties, articles, speeches, unique experience or training: \_\_\_\_\_

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

Principal civic and professional memberships: \_\_\_\_\_

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

**Please attach your Curriculum Vita.**

Date \_\_\_\_\_

Applicant \_\_\_\_\_

## QUALIFICATIONS

**Active Membership.** To be eligible for active membership in the Corporation a person must be actively practicing in the area of estate planning, financial planning or employee benefit planning and must be engaged in a qualifying profession or business. **Such qualified persons shall consist of: (1) representatives of trust companies and banks maintaining trust departments; (2) life underwriters who have the CLU or ChFC designation and are licensed to do business in Wisconsin; (3) lawyers who are members in good standing of the State Bar of Wisconsin; (4) certified public accountants who are members in good standing of the Wisconsin Institute of Certified Public Accountants; (5) business persons who are Chartered Financial Consultants certificated by the American College, Bryn Mawr, Pennsylvania, or Certified Financial Planners certificated by the Certified Financial Planner Board of Standards, Inc, Washington, DC; (6) persons engaged in planned giving or fundraising on behalf of philanthropic organizations; and (7) business persons actively practicing in the area of estate planning or employee benefit planning.** Nevertheless, despite engaging in such profession or business, no person shall be eligible for membership unless such person: (1) has actively engaged in one or more such professions or businesses during the two consecutive years immediately preceding the date of the person's application for membership and, (2) has maintained an office or place of business in the Milwaukee metropolitan area for one year immediately preceding filing of an application for membership, or is a transferee as an active member of another estate planning council or equivalent organization. For purposes this paragraph A, the term "Milwaukee metropolitan area" shall mean Milwaukee County, Ozaukee County, Washington County, Waukesha County and Racine County.

**Member Election.** In order to be elected to membership in the Corporation, an eligible applicant may self nominate or be recommended by an active member of the Corporation. The applicant must (a) complete a membership application on a standard application form prescribed by the Board of Directors, (b) obtain two (2) letters or recommendation as described below and (c) submit the completed membership application and the two (2) letters of recommendation to the Membership Committee of the Corporation. Of the two persons that write the letters of recommendation, one shall be an active member of the Corporation and the other shall either be an active member of the Corporation or an active member of another corporation, approved by the National Association of Estate Planners & Councils. One shall be in the same professional discipline as the applicant, while the other shall be in a different professional discipline; except that in the case of an eligible applicant applying under category 7 of the application (other person actively practicing in area of estate planning or employee benefit planning), neither person writing a letter of recommendation need be in the same professional discipline as the applicant. Furthermore, no more than one letter of recommendation may be from the same organization that employs the applicant. The applicant shall agree to comply with all the Articles, By-Laws and Resolutions of the Corporation. The qualifications of the applicant for membership shall be reviewed by the Membership Committee and, if approved, shall be submitted to the Board of Directors at any regular or special meeting. Upon approval by the vote of a majority of the Board of Directors, and upon payment of such dues and fees as may be prescribed from time to time by the By-Laws or by Resolution of the Board of Directors, the applicant for membership shall become a member of the Corporation.

**Procedure.** Applicant should complete and sign the application. Obtain two (2) letters of recommendation addressed to the **Membership Committee, c/o Robert Holton, BMO Private Bank, 790 N. Water St, Floor 11, Milwaukee, WI 53202, [Robert.holton@bmo.com](mailto:Robert.holton@bmo.com) (414) 287-8809 (telephone).**

Your application is submitted with the understanding that you be considered for membership by the Membership Committee. A committee member may do a phone interview with you prior to your application being submitted to the Board of Directors.