



Tulsa Estate Planning Forum New Member Application

Term: July 1, 2026-June 30, 2027

Personal Information

Full Name:

Professional Credential(s):

Employer/Related Business:

Business Website:

Address:

City: Postal Code:

Phone: Email:

Primary Discipline (Must select one for future Board representation purposes):

Primary Discipline: ☐ Trust Officer ☐ Attorney ☐ CPA ☐ Financial Planning/Insurance (CLU, ChFC, CFP®)

Secondary Discipline:
(Optional for enhanced website search)

Membership Category (See below for membership category eligibility criteria):

- ☐ **Regular Member** - holds a credential and has a minimum of two years of experience in one of the four disciplines and is actively engaged in estate planning.
- ☐ **Senior Member** - has been a member of the Tulsa Estate Planning Forum for more than 10 years and is over age 65.
- ☐ **Provisional Member** - holds a credential in one of the four disciplines but has not had a minimum of two years of experience in estate planning.
- ☐ **Associate Member** - is a professional employed by, or regularly associated with, an active Regular Member's practice of estate planning.
- ☐ **Student Member** - is pursuing qualifications in one of the four disciplines of estate planning.

Member Interest in Sponsorship Opportunities:

☐ Meeting Sponsor ☐ Social Event Sponsor ☐ Silver Level Sponsor ☐ Annual Meeting Table Sponsor

Referring Member Reference

Current Member Reference:
(Who referred you for membership?)

Suggested topic or speaker for future meeting:

Return Application & Payment Instructions



**Please return this form with your check for membership dues of \$295 made payable to:
Tulsa Estate Planning Forum, c/o Jamie Jenkins, P.O. Box 470994, Tulsa, OK 74147**

You may also return this application electronically and pay using credit card by clicking the link above. Contact Jamie.Jenkins@bancfirst.bank with any questions.