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| --- |
| Name and Professional Credential(s): \_  Related Business Name: \_  Mailing Address: .    Phone Number: Fax Number: \_  E-mail: Website: \_ |
| Primary Discipline (pick one for Board representation purposes):  Trust Officer Financial Planning/Insurance (CLU, ChFC, CFP) Attorney CPA  Secondary Discipline (optional for enhanced website searches): \_ |
| Membership Category:  Regular Member – is credentialed in one of the four disciplines, has a minimum of two years’ experience in estate planning, and actively engaged in the practice of estate planning OR was a regular member on June 30, 2010  Senior Member – has been a member of the Forum for more than 10 years and is over the age of 65  Provisional Member – is credentialed in one of the four disciplines, but has not achieved 2 years of estate planning experience  Associate Member – is a professional employed by, or regularly associated with, a Regular Member’s practice of estate planning  Student Member – is pursuing qualifications in one of the four disciplines |
| Experience in the field of estate planning and/or administration: |
| Applicant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ ­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Recommending Member (Please Print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_ ­\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Approved by Board: \_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_ \_\_\_\_\_\_\_\_ ­\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_­­­­\_\_\_ |
| **Please return this application to the Tulsa Estate Planning Forum with your check for $295 to:** Tulsa Estate Planning Forum, c/o Jamie Jenkins, PO Box 470994, Tulsa OK 74147 |



**NEW MEMBER APPLICATION**  **– 2025-2026 MEMBERSHIP YEAR**

**NEW MEMBER APPLICATION ONLY FOR THE PERIOD OF JULY 1, 2025 TO JUNE 30, 2026, NOT FOR RENEWING APPLICANTS**