



## **NEW MEMBER APPLICATION – 2023-2024 MEMBERSHIP YEAR**

NEW MEMBER APPLICATION ONLY FOR THE PERIOD OF JULY 1, 2023 TO JUNE 30, 2024, NOT FOR RENEWING APPLICANTS

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: \_\_\_\_\_ Date: \_\_\_\_\_

Approved by Board: \_\_\_\_\_ Date: \_\_\_\_\_

**Please return this application to the Tulsa Estate Planning Forum with your check for \$250 to:**  
Tulsa Estate Planning Forum, c/o Tiffany A. Chaney, 8703-R N. Owasso Expressway, #128, Owasso, OK 74055