



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

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 \$295 to:
Tulsa Estate Planning Forum, c/o Jamie Jenkins, PO Box 470994, Tulsa OK 74147