



MEMBERSHIP RENEWAL FORM – 2025-2026 MEMBERSHIP YEAR

RENEWAL ONLY - NOT FOR NEW MEMBER APPLICATION

Please go to www.TulsaEPF.org, click on Member Directory, enter your name, click Search Members then click on your name to see what information we have for you. If it is correct, just fill in your name below.
If the information we have in not correct, please update your information below.

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

☐

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

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Senior Member – has been a member of the Forum for more than 10 years and is over the age of 65

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Provisional Member – is credentialed in one of the four disciplines, but has not achieved 2 years of estate planning experience

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Associate Member – is a professional employed by, or regularly associated with, a Regular Member's practice of estate planning

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Student Member – is pursuing qualifications in one of the four disciplines

Please contact me about sponsorship opportunities:

☐

Door Prizes

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Placemats

☐

Website

☐

Meetings

Topic of interest for a future meeting: _____

I would like to refer the following person for consideration for TEPF membership: _____

Applicant making referral: _____ 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