

Application for Bronze Membership

Annual Dues \$300

Includes 1 AAEP membership; 1 complimentary admission to all regular programs.



ANNE
ARUNDEL
ESTATE
PLANNING
COUNCIL

c/o Community Foundation
of Anne Arundel County
914 Bay Ridge Road, Suite 220
Annapolis, MD 21403
(410) 280-1102
email: AAEP@cfac.org
www.aestateplanning.org

I hereby apply for membership in the Anne Arundel Estate Planning Council.

Full Name: _____

Professional Degrees / Designations held (check all that apply):

Atty CPA CLU® ChFC® AEP® CFA CFP® CTFA CWS® CAP®
 MSFS Other, please list: _____

What is your **PRIMARY** professional discipline? (choose one):

attorney accountant trust officer insurance professional
 financial planning professional wealth manager
 Other, please list and explain: _____

Years of practice: _____

Present Employer: _____

Business Address: _____

Business City, State & Zip Code: _____

Business Phone: _____ Fax: _____

Cell Phone: _____ (if you would like it listed in the AAEP Member Directory)

Email: _____

Website for online posting: <http://www.> _____

Educational/Professional Background:

applicant signature

print applicant name clearly

application date

*Anne Arundel Estate Planning Council is an educational program of the Community Foundation of Anne Arundel County, a 501(c)(3) organization recognized by the Internal Revenue Service. As such, all contributions are tax deductible to the maximum allowed by law. Upon request, CFAAC will provide the fair market value (FMV) of your contribution for you and your tax advisor to determine tax deductibility. The Steering Committee of the Anne Arundel Estate Planning Council or its designee must approve all applications for membership. Once membership has been granted and fees paid, annual membership will not be refunded, pro-rated or transferred.

Approval _____

Acceptance Date _____

To pay for your 2019 membership, you may enclose a check made payable to CFAAC for \$300, noting AAEP membership in the memo line, or pay online by [clicking here](#).