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## Estate & Financial Planning Council of Southern New Jersey

*Member of the National Association of Estate Planners and Councils*



### Membership Application

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

I am actively engaged in the estate and/or financial planning profession in \_\_\_\_\_ county for \_\_\_\_\_ years.

I hold a license or designation/certification and am a member in good standing in the following:

\_\_\_\_\_ Attorney \_\_\_\_\_ CPA \_\_\_\_\_ CFP \_\_\_\_\_ ChFC \_\_\_\_\_ CLU  
\_\_\_\_\_ CTFA or qualified professional employed in tax, trust or estate practice by a financial services firm.

Or I have a \_\_\_\_\_ certification/designation.

My area of discipline(s): \_\_\_\_\_ Accountant \_\_\_\_\_ Attorney \_\_\_\_\_ Financial Planner  
\_\_\_\_\_ Reverse Mortgage Consultant \_\_\_\_\_ Insurance \_\_\_\_\_ Trust Officer

Or: I have been involved in this industry as: \_\_\_\_\_

Or I would like to apply to be a member of EFPCSNJ under one of the following non-voting member categories:

\_\_\_\_\_ **Young Professional** (\$75 annually) For young professionals 35 years of age or less that do not have the necessary credentials or experience but are working towards full membership

\_\_\_\_\_ **Associate Member** (\$195 annually) for people that provide services to the clients of EFPCSNJ members but do not have the necessary designations to become a full member and are not primarily involved in the financial planning process. Associate Members are offered a \$100 discount on one EFPCSNJ Breakfast Meeting Sponsorship.

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

Recommended by Member: \_\_\_\_\_  
(please print)

Signature of Member: \_\_\_\_\_

Regular Membership cost: \$170 per year. You can also submit your membership application online at [www.efpcsnj.org](http://www.efpcsnj.org). Corporate membership is available.

**Fax or mail completed application to: Estate & Financial Planning Council of Southern NJ, PO Box 460 Collingswood, New Jersey 08108 Fax: 856-210-1619**