



MEMBERSHIP APPLICATION 2026-2027

Name: _____

Designations for Member Directory Listing (e.g. Esq, CPA, CFP, CTFA, etc.) _____

Business Name: _____

Business Address: _____

Business Phone Number: _____

Email Address: _____ Website: _____

Membership Category: Mark any applicable categories, in order (primary, secondary, etc.).

___ an officer, manager or administrator of the trust department of a trust company or state or federally-chartered bank; or

___ an individual licensed as a life insurance agent or life insurance broker by the State of New York; or

___ an individual who has attained a Chartered Life Underwriter, Chartered Financial Consultant or Certified Financial Planner designation; or

___ an attorney admitted to practice law in the State of New York; or

___ an accountant licensed as a Certified Public Accountant by the State of New York; or

___ a certified fundraising executive; or

___ an individual who has attained an accreditation in business valuation by a nationally recognized professional organization; or

___ any individual not falling into any of the above seven categories who is seeking qualification for Membership in the discretion of the Board of Directors.

Provide your primary discipline or designation, any professional degrees, licenses, designations and titles, and any professional associations of which you are a member in good standing:

Signature of Applicant

Date

Estate Planning Council of Eastern New York, Inc PO Box 11136 Loudonville, NY 12211

Please Read Carefully

PAYMENT OPTIONS

By mail:

Submit a check payable to the Estate Planning Council of Eastern New York, Inc. for **\$275.00*** with the completed application to:

Stephanie Cogan, Executive Director
Estate Planning Council of Eastern New York, Inc.
P.O. Box 11136
Loudonville, New York 12211

OR

Online:

1. Email completed application to epceny@gmail.com
2. Pay online [HERE \(http://www.epceasternewyork.org/members/renewal\)](http://www.epceasternewyork.org/members/renewal)

*\$50.00 Application Fee and \$225.00 for Annual Dues for the fiscal year ending June 30th

Questions? Email or call: epceny@gmail.com or 518-458-7774

Thank you!

Estate Planning Council of Eastern New York, Inc PO Box 11136 Loudonville, NY 12211

www.epceasternewyork.org epceny@gmail.com 518-458-7774