

# Quad City Estate Planning Council 2022-2023

## APPLICATION FOR ASSOCIATE\* MEMBERSHIP

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

Application for Membership in the Quad City Estate Planning Council is hereby made by:

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

Firm/Organization: \_\_\_\_\_ Tel. #: \_\_\_\_\_

Business Address: \_\_\_\_\_ Cell #: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Fax #: \_\_\_\_\_

E-mail: \_\_\_\_\_ Website: \_\_\_\_\_

Discipline:

Attorney (with less than 3 yrs in practice) \_\_\_\_\_ CPA (with less than 3 yrs in practice) \_\_\_\_\_

CLU (have completed minimum of 4 of 8 CLU/ChFC courses) \_\_\_\_\_ Trust Officer \_\_\_\_\_

Special: \_\_\_ ChFC \_\_\_ CFP \_\_\_ AEP; Other: \_\_\_\_\_

If other, please explain: \_\_\_\_\_

Years in Discipline: \_\_\_\_\_ %Time Estate Planning currently: \_\_\_\_\_

Reasons for wanting to be a member of the Council: (Include items of relevant interest, such as professional background, professional organizations, lectures, publications, etc.)

---

---

---

Name two Current Quad City Estate Planning Council Members as Sponsors:

Sponsor #1 \_\_\_\_\_ Signature \_\_\_\_\_

Sponsor #2 \_\_\_\_\_ Signature \_\_\_\_\_

Applicant Signature \_\_\_\_\_

Return completed application to:

**Quad City Estate Planning Council**  
**PO Box 4732**  
**Davenport, IA 52808**  
**-or scan & email to: QCEstatePlanningCouncil@gmail.com**

Questions? Contact us via email: [QCEstatePlanningCouncil@gmail.com](mailto:QCEstatePlanningCouncil@gmail.com)

For general information visit: <http://www.qcestateplan.org/>

*\*Associate Membership is limited to 3 years\**

*\*\*Associate Membership Dues for 2022-2023 Membership Year (Sept. 2022 thru Aug. 2023) are \$150, or \$85 if application is received after Dec. 31, 2022\*\**

FOR OFFICE USE

Actions on Application:

Received (by cd): \_\_\_\_\_ Distributed to Board (at monthly Board Meeting): \_\_\_\_\_ Distributed to current Membership: \_\_\_\_\_

Approved (10 days post dist to mbrshp): \_\_\_\_\_ New Member Notified on Action: \_\_\_\_\_ Invoiced for Current Dues \_\_\_\_\_