

THE FRASER VALLEY ESTATE PLANNING COUNCIL MEMBERSHIP APPLICATION FORM

Council Format & Objectives

Individuals are invited to join The Fraser Valley Estate Planning Council and attend dinner meetings to be held five times each year.

The Council will:

1. Provide a forum for, and promote communication among, professionals engaged in the planning and administration of estates and planned gifts;
2. Offer educational seminars that enhance the professional development of the members;
3. Encourage mutual understanding among members of the function of each profession represented in Council membership;
4. Review existing laws and regulations and draft new ones affecting the planning and administration of estates and planned gifts and present the position of the membership of the Council to the appropriate authorities;
5. Increase awareness and understanding of the mandate of the Council among potential members, clients of members, other professional associations, and the general public.

We hope you will consider joining us and enjoy the benefits of being a member of The Fraser Valley Estate Planning Council. Membership is open to individuals who meet the membership criteria.

Rev 06/06/10

(excerpt from Articles of Association)

Article III MEMBERSHIP

Membership in The Fraser Valley Estate Planning Council is open to individuals who conduct their business or have their residence located in the Fraser Valley and who are:

1. Members of the British Columbia Bar holding a current practice certificate from the Law Society of British Columbia
2. Members of the
 - a. Institute of Chartered Accountants of British Columbia
 - b. Certified Management Accountants Association of British Columbia, or
 - c. Certified General Accountants Association of British Columbia
3. Trust or Estate executives or administrators of financial institutions
4. Members of the Canadian Association of Insurance and Financial Advisors
5. Financial Planners with one of the following professional designations:
 - a. Certified Financial Planner (CFP)
 - b. Registered Financial Planner (RFP)
 - c. Chartered Financial Consultant (CHFC)
 - d. Certified Investment Manager (CIM)
 - e. Chartered Financial Analyst (CFA)
6. Portfolio Managers licensed with the British Columbia Securities Commission
7. Fellows of the Canadian Institute of Actuaries
8. Academics with relevant expertise representing British Columbia post-secondary institutions
9. Others who, although they do not meet the criteria for any other category of membership, are deemed by the Executive Committee to have qualifications, knowledge or experience that will advance the purposes of the Council
10. Honorary or Life Members elected by the membership of the council using criteria established by the Executive Committee

See over

I wish to be a member of The Fraser Valley Estate Planning Council.

Date of Application:

NAME:

COMPANY:

TITLE:

STREET ADDRESS:

CITY:

PROV:

POSTAL CODE:

TELEPHONE:

FAX:

EMAIL:

WEBSITE:

www.

EDUCATION / QUALIFICATIONS:

AREAS OF SPECIALITY:

PROFESSIONAL MEMBERSHIPS/ACTIVITIES:

OTHER MEMBERSHIPS:

CE & PACE Certificate required:

Yes

No

OCCUPATION / FVEPC CATEGORY:

(* Please see Article III on reverse for membership category)

YEAR JOINED:

Actuary

Designated Accountant

Designated Other

Educational Institution Rep

Financial Planner

Lawyer

Life Insurance Underwriter

Portfolio Manager

Trust & Estate Practitioner

HOW DID YOU HEAR ABOUT FVEPC/WHO REFERRED YOU?

MEMBERSHIP FEES: (includes 5 dinners)

New Members \$250

Returning Members \$250

First Time Guests Dinner Meeting Fee \$30 per dinner meeting

Returning Guests \$55 per dinner meeting

Guests may attend one event before a decision is requested on becoming a member.

PAYMENT:

Cheque Amount: \$_____

(payable to The Fraser Valley Estate Planning Council)

By signing this form below and becoming a member, you consent to have your information listed on the FVEPC website.

Please send this form with your dues to:

Laurie Daschuk, Executive Coordinator
The Fraser Valley Estate Planning Council
c/o 2590 Lavender Court
Abbotsford BC V3G 3E7 OR
ldaschuk@telus.net
OR Fax 604-850-5083

