

**THE FRASER VALLEY ESTATE PLANNING COUNCIL
MEMBERSHIP RENEWAL FORM**

FVEPC FORMAT & OBJECTIVES

YOU ARE INVITED to renew your membership in The Fraser Valley Estate Planning Council and attend our meetings, which are held five times each year.

In 2010/2011 we intend to continue meetings in a dinner format, with time for conversation and networking, and effective speakers on topics of interest to our members. Our objectives remain:

1. To **provide a forum** for, and promote communication among, professionals engaged in the planning and administration of estates and planned gifts.
2. To **offer educational seminars** that enhance the professional development of the members.
3. To **encourage mutual understanding** among members of the function of each profession represented in Council membership.
4. To **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 members of the Council to the appropriate authorities.
5. To **increase awareness** and understanding of the mandate of the Council among potential members, the clients of the members, other professional associations, and the general public.

WE HOPE YOU WILL RENEW YOUR MEMBERSHIP and continue to enjoy the benefits of being a member of The Fraser Valley Estate Planning Council. Membership is open to individuals who meet the membership criteria (described on the right side of this page).

Rev 08/09/10

(excerpt from the Council's 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 B.C.
2. Members of the
 - a. Institute of Chartered Accountants of B.C.
 - b. Certified Management Accountants Association of B.C., or
 - c. Certified General Accountants Association of B.C.
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

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

Date of Application:

Please write in your name below and any information about you which has changed from the previous year. If no information has changed check here:

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: <input type="checkbox"/> Yes <input type="checkbox"/> No		
OCCUPATION / FVEPC CATEGORY: (*Please see Article III on the reverse of this page for the category descriptions)		
<input type="checkbox"/> Actuary	<input type="checkbox"/> Designated Accountant	<input type="checkbox"/> Designated Other
<input type="checkbox"/> Educational Institution Rep	<input type="checkbox"/> Financial Planner	<input type="checkbox"/> Lawyer
<input type="checkbox"/> Life Insurance Underwriter	<input type="checkbox"/> Portfolio Manager	<input type="checkbox"/> Trust Company Rep
MEMBERSHIP FEES: (includes all 5 dinners)		
Annual Membership	\$250	
Returning Members	\$210 (before Sept. 7th)	\$250 (after Sept. 7th)
First Time Guest	\$30 per dinner meeting	
Returning Guest	\$55 per dinner meeting	
<i>Guests may attend one event before a decision is requested on becoming a member.</i>		
PAYMENT: Cheque Amount: \$ _____ (payable to The Fraser Valley Estate Planning Council) (we no longer accept VISA payments)	Please send this form with your fees to: Laurie Daschuk, Executive Assistant The Fraser Valley Estate Planning Council c/o 2590 Lavender Court Abbotsford BC V3G 3E7 or ldaschuk@telus.net OR Fax 604-850-5083	
2010/2011 Membership		