

# THE FRASER VALLEY ESTATE PLANNING COUNCIL

## Membership Application Form

### FVEPC FORMAT & OBJECTIVES

Estate Planning Professionals are invited to join The Fraser Valley Estate Planning Council and attend our meetings, which are held five times each year.

In 2019/2020 the council will hold 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 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 (described on the right side of this page).

*(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 Chartered Professional Accountants of B.C. (CPA)
3. Trust or Estate executives or administrators of financial institutions
4. Members of the Society of Notary Publics B.C.
5. Members of the Advocis:
  - a) Chartered Life Underwriter (CLU)
  - b) Certified Health Insurance Specialist (CHS)
6. Financial Planners with one of the following professional designations:
  - a. Certified Financial Planner (CFP)
  - b. Registered Financial Planner (RFP)
  - c. Certified Investment Manager (CIM)
  - d. Chartered Financial Analyst (CFA)
7. Portfolio Managers licensed with the British Columbia Securities Commission
8. Fellows of the Canadian Institute of Actuaries
9. Academics with relevant expertise representing British Columbia post-secondary institutions
10. 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
11. Honorary or Life Members elected by the membership of the Council using criteria established by the Executive Committee

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

Date of Application:

<b>Name:</b>	
<b>Company:</b>	
<b>Title/Occupation:</b>	
<b>Street Address:</b>	
<b>City:</b>	<b>Postal Code:</b>
<b>Telephone:</b>	<b>Fax:</b>
<b>Email:</b>	<b>Website:</b>
<b>Education/Qualifications:</b>	
<b>Areas of Focus/Specialty:</b>	
<b>Who Referred You?</b>	<b>How Did You Hear About Us?</b>
Do you have a LinkedIn profile? Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>FVEPC Category:</b> *Please see Article III on the first page for category descriptions	
<input type="checkbox"/> Chartered Professional Accountant	<input type="checkbox"/> Lawyer
<input type="checkbox"/> Financial Planner	<input type="checkbox"/> Notary
<input type="checkbox"/> Insurance Professional	<input type="checkbox"/> Trust Company
	<input type="checkbox"/> Designated Other *please specify
<b>MEMBERSHIP FEES:</b> (includes 5 dinners) <b>Annual Membership Fee</b> Begins September 2019 Or First Time Guest \$75/dinner meeting <b>\$315</b> Membership is pro-rated after November 2019, please contact for pro-rated fee amount. <b>To pay by credit card, please visit:</b> <a href="http://squareup.com/store/fvepc">http://squareup.com/store/fvepc</a>	
<b>Choose Payment:</b> Cheque Amount: \$_____ (payable to The Fraser Valley Estate Planning Council)  Credit Card: Pay online at: <a href="http://www.fvepc.com/fvepc-payment-page">http://www.fvepc.com/fvepc-payment-page</a>  By signing this form below and becoming a member, you consent to have your information listed on the FVEPC website, give express consent for email communications, and grant permission for your photo to be taken during an event and used for promotional purposes.  X_____	<b>Please send this form with your fees to:</b>  Executive Coordinator Fraser Valley Estate Planning Council 33337 Wren Cres Abbotsford, BC V2S 5V9  Or Email <a href="mailto:Coordinator@fvepc.com">Coordinator@fvepc.com</a>  Phone 604-226-6734  2019-2020 Membership