



NEW MEMBER APPLICATION – 2024-2025 MEMBERSHIP YEAR

NEW MEMBER APPLICATION ONLY FOR THE PERIOD OF JULY 1, 2024 TO JUNE 30, 2025, NOT FOR RENEWING APPLICANTS

Name and Professional Credential(s): _____

Related Business Name: _____

Mailing Address: _____

Phone Number: _____ Fax Number: _____

E-mail: _____ Website: _____

Primary Discipline (pick one for Board representation purposes):

- Trust Officer Financial Planning/Insurance (CLU, ChFC, CFP) Attorney CPA

Secondary Discipline (optional for enhanced website searches): _____

Membership Category:

- Regular Member – is credentialed in one of the four disciplines, has a minimum of two years' experience in estate planning, and actively engaged in the practice of estate planning OR was a regular member on June 30, 2010
- Senior Member – has been a member of the Forum for more than 10 years and is over the age of 65
- Provisional Member – is credentialed in one of the four disciplines, but has not achieved 2 years of estate planning experience
- Associate Member – is a professional employed by, or regularly associated with, a Regular Member's practice of estate planning
- Student Member – is pursuing qualifications in one of the four disciplines

Experience in the field of estate planning and/or administration:

Applicant signature: _____ Date: _____

Recommending Member: _____ Date: _____

Approved by Board: _____ Date: _____

Please return this application to the Tulsa Estate Planning Forum with your check for \$275 to:
Tulsa Estate Planning Forum, c/o Tiffany A. Chaney, 8703-R N. Owasso Expressway, #128, Owasso, OK 74055