



## **MEMBERSHIP RENEWAL FORM – 2024-2025 MEMBERSHIP YEAR**

RENEWAL ONLY - NOT FOR NEW MEMBER APPLICATION

Please go to [www.TulsaEPF.org](http://www.TulsaEPF.org), click on Member Directory, enter your name, click Search Members then click on your name to see what information we have for you. If it is correct, just fill in your name below.  
If the information we have in not correct, please update your information below.

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     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

Please contact me about sponsorship opportunities:

- Door Prizes     Placemats     Website     Meetings

Topic of interest for a future meeting: \_\_\_\_\_

I would like to refer the following person for consideration for TEPF membership: \_\_\_\_\_

Applicant making referral: \_\_\_\_\_ 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