

TO: Board of Directors, Estate Planning Council of Rhode Island



FROM: \_\_\_\_\_ DATE: \_\_\_\_\_

Ladies and Gentlemen:

I hereby propose the following individual for membership in the Estate Planning Council of Rhode Island

Name: \_\_\_\_\_  
(Please print or type)

Title at Company: \_\_\_\_\_

Firm (Business) Name: \_\_\_\_\_

Contact Address: \_\_\_\_\_  
\_\_\_\_\_

E-mail Address: \_\_\_\_\_

Phone number: \_\_\_\_\_ Web site: \_\_\_\_\_

This individual is actively engaged in the estate planning area in RI as a: (select one)			
<input type="checkbox"/>	Banker active in Trust and/or Wealth Management	<input type="checkbox"/>	Lawyer
<input type="checkbox"/>	Certified Financial Planner	<input type="checkbox"/>	Planned Giving Officers of Not-For-Profit Organizations
<input type="checkbox"/>	Certified Public Accountant (including Enrolled Agent)	<input type="checkbox"/>	Other: Specify:
<input type="checkbox"/>	Chartered Life Underwriter		

List any additional states in which you are licensed to practice: \_\_\_\_\_  
\_\_\_\_\_

Print Name of Sponsor: \_\_\_\_\_

Print email: \_\_\_\_\_

Signature: \_\_\_\_\_

Second to Nomination

Print Name of Seconder: \_\_\_\_\_

Print email: \_\_\_\_\_

Signature: \_\_\_\_\_

Email completed form to EPCRI Secretary at [admin@epcri.org](mailto:admin@epcri.org)

EPCRI SECRETARY USE

\_\_\_\_\_ Date emailed to Board

\_\_\_\_\_ Date Dues Notice sent \$

\_\_\_\_\_ Date Approved

\_\_\_\_\_ Date Welcome Letter sent

\_\_\_\_\_ Date to website

Revised 08/2022