



Qualifications for Membership

Eligibility and Qualifications

- c. The membership of the Council shall be restricted to persons who occupy the following professional or vocational status:
 - i. Officers of corporations authorized to exercise trust powers in the State of Florida;
 - ii. Attorneys-at-Law licensed to practice in the State of Florida;
 - iii. Certified Public Accountants licensed to practice in the State of Florida, enrolled IRS agents, or full-time employees of the IRS;
 - iv. Certified Financial Planners, Chartered Life Underwriters, Chartered Financial Consultants, Chartered Financial Analysts, Chartered Market Technicians, Certified Trust and Financial Advisors, Certified Investment Management Analysts, or Chartered Alternative Investment Analysts;
 - v. Certified Fund Raising Executives or full-time planned giving professionals employed by or consulting with Section 501(c)(3) organization(s); or
 - vi. Individuals who previously held membership in the Council, are retired or not presently working, and are approved by the Board of Directors.

- d. An applicant, in order to be eligible for membership, must be:
 - i. actively engaged in estate or financial planning for not less than three (3) years and occupy one of the professional or vocational licenses, designations or employment status specified in Section (a) above for at least one (1) full year in the State of Florida; or
 - ii. an individual who previously held membership in the Council, is retired or not presently working, and is approved by the Board of Directors.

- e. An applicant must have two existing members recommend the applicant. At least one of the recommending members must have the same professional discipline as the applicant (e.g., an accountant member recommending an accountant applicant), and one of whom must not be a member of the same firm or institution as the applicant.

- f. Applicants should mail their application and a check for \$450 payable to the **Greater Boca Raton Estate Planning Council** to **Beverley Todd**, 8927 Hypoluxo Rd, Ste A-4,. PMB 152, Lake Worth, FL 33467.

Qualifications for Associate Membership

Eligibility and Qualifications

- a. Associate membership in the Council shall be restricted to the following persons:
 - i. Students who are enrolled in Florida college or post graduate program and are pursuing a degree or career in law, accounting, estate planning or financial planning;
 - ii. Graduates of colleges or post graduate schools (in Florida or outside of Florida) who maintain their primary residence in Florida and are actively engaged in estate or financial planning in Florida, but have been so engaged for less than three (3) years.
- b. An applicant for associate membership must have two existing members recommend the applicant. At least one of the recommending members must not be a member of the same firm or institution as the applicant.
- c. Associate members do not have any rights, privileges or prerogatives of membership, other than the right to attend meetings and pay for meetings attended.
- d. Applicants for associate membership should mail applications to the **Greater Boca Raton Estate Planning Council** c/o **Beverley Todd**, 8927 Hypoluxo Rd, Ste A-4, PMB 152, Lake Worth, FL 33467.