



National Association of
Estate Planners & Councils

2011-2012 DUES NOTICE AND MEMBERSHIP DIRECTORY UPDATE
ANCHORAGE ESTATE PLANNING COUNCIL

NAME: _____ OFFICE PHONE: _____

ADDRESS: _____

Meeting and Council information is distributed exclusively via email.

Primary email: _____ Alternate email: _____

Our membership dues for the 2011-2012 season are as follows:

Postmarked prior to September 6, 2011	\$200
Postmarked on or after September 6, 2011	\$220
Printed Membership Directory (PDF no charge)	\$10

Please make your check payable to the **Anchorage Estate Planning Council**.

We typically meet the last Monday of each month at the Petroleum Club, located at 3301 C Street, Suite 120, over the Noon hour with a buffet lunch provided.

MEETING DATES

September 26, 2011	December 5, 2011*	March 26, 2012
October 31, 2011	January 30, 2012	April 30, 2012
November 28, 2011	February 27, 2012	May 21, 2012

* The Holiday Party is scheduled for Monday evening, December 5, 2011 at Kinley's Restaurant with more information to follow.

According to our Bylaws, all members must attest to the following (full membership requires all 3 items; associate membership requires only the first 2 items – please check those that apply):

- You are an estate planning professional actively practicing, licensed, and/or interested in estate planning or related subjects in the Third Judicial District, (i.e. Anchorage area)
- You are in good standing in your respective professional association.
- For full membership, you must also be a(n): *(please check at least one)*
 - Attorney
 - CPA
 - Life insurance underwriter
 - Trust Officer
 - Financial planner

I certify that I meet the qualifications for membership in the Anchorage Estate Planning Council as noted above:

Signature

Date

2011-2012 DUES NOTICE AND REFERRAL DIRECTORY UPDATE
ANCHORAGE ESTATE PLANNING COUNCIL

Membership Directory: A PDF version of the directory will be available to all members at no charge. In order to keep membership rates the same as last year, printed-bound membership directories will be available for an additional cost of \$10.

_____ Please send a paper copy of the Membership Directory, I have enclosed an additional \$10 with this application.

Your directory page should include any information that you feel is relevant to another professional who is considering referring a client to you. The space allotted is **one side of one page**. Some members use their company's letterhead or other pre-printed resume. Please refer to prior directories for examples.

The directory on our website, www.anchorageepc.org, now allows us to post your photo (jpeg format) and a link to your business website. If you would like to take advantage of these features, please email Janine Becka, Executive Director at jbecka@gci.net with the necessary jpeg file and information. If you have any questions please contact Janine at (907) 243-1160. You may also contact the AEPC Board President, Laura Bruce at (907) 646-3509 or email at Laura@APCM.net

Please send a copy of this completed form along with your check, as well as your completed Membership Referral Directory information to:

Anchorage Estate Planning Council, P.O. Box 240741, Anchorage, AK 99524-0741.

In order to be included in the printed directory, we must have your information no later than September 15, 2011. Photo and website address must be sent separately to Janine by the same deadline, 9/15/11.

DIRECTORS FOR 2011-2012

Laura Bruce, CFP(R)	President
Cindy Hulquist, CPA	President-Elect, Program Chair
Wayne Eski, CPA	Treasurer, Membership Chair
Christina Passard, Attorney	Immediate Past President
William Pearson, Attorney	Secretary
Jim Plymire, Trust Administration	Director
Brenda Tudor, Trust Administration	Director
Glen Bobo, CLU, ChFC	Director
Kim Aasand, CPA, PFS	Director
Alan Sandar, Financial Advisor	Director

ANCHORAGE ESTATE PLANNING COUNCIL

MEMBERSHIP DIRECTORY QUESTIONNAIRE

NAME: _____

PLACE OF BIRTH: _____

ESTATE PLANNING DISCIPLINE: _____ **PRACTICING SINCE:** _____

BUSINESS NAME: _____

DESCRIPTION OF PRACTICE AND WORK ACCEPTED ON REFERRAL:

EDUCATIONAL BACKGROUND, SPECIAL PROFESSIONAL CREDENTIALS, TRAINING, LOCAL, STATE, NATIONAL HONORS AND POSITIONS, ETC.

PARTICIPATION IN ANY CIVIC, CULTURAL AND COMMUNITY ORGANIZATIONS, VOLUNTEER ACTIVITIES, MEMBERSHIP, OFFICES, BOARD POSITIONS, ETC.

FAMILY, PERSONAL HOBBIES AND ACTIVITIES:

