

# DURHAM-ORANGE ESTATE PLANNING COUNCIL MEMBERSHIP APPLICATION

Name: \_\_\_\_\_

## Qualifying Designation(s) Held:

*(Please Select All That Apply – Must Have At Least One To Qualify For Membership)*

- Trust Officer and Wealth Management Officer of Trust Company and Banks, Maintaining Trust Department or Offering Trust Services
- Chartered Life Underwriter
- Member of The North Carolina State Bar
- Certified Public Accountant
- Chartered Financial Consultant
- Certified Financial Planner
- Officer of Community Foundation and of Other Non-Profit Organizations
- Chartered Retirement Planning Counselor, Interested In and Actively Practicing Estate Planning or Matters Directly Related To Estate Planning In The Durham-Orange County Area

Please List Other Designations And/Or Degrees: \_\_\_\_\_

Firm/Company: \_\_\_\_\_

Position: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Daytime Telephone: \_\_\_\_\_ Facsimile Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

REFERENCES: (MUST HAVE 2 FROM ACTIVE COUNCIL MEMBERS IN GOOD STANDING)	
NAME (Print or Type)	Member's Signature & Date
1.	
2.	
APPLICANT'S SIGNATURE	
Signature of Applicant:	Date:
By signing above, I represent that I am current and in good standing with regard to my qualifying designations and that I am actively practicing estate planning or matters directly related to estate planning in the Durham and Orange County area.	

PLEASE SUBMIT YOUR COMPLETED APPLICATION, VIA ONE OF THE FOLLOWING OPTIONS:

MAIL OR E-MAIL TO:

Sharon Lassiter, Administrator  
Durham-Orange Estate Planning Council  
Post Office Box 51572 – Durham, North Carolina 27717  
[Slassiter38@nc.rr.com](mailto:Slassiter38@nc.rr.com)