



# APPLICATION FOR NEW PROFESSIONAL MEETING ATTENDEE

NAME OF APPLICANT: \_\_\_\_\_  
DESIGNATION(S): \_\_\_\_\_  
# OF YEARS IN PRACTICE: \_\_\_\_\_  
NAME OF EMPLOYER: \_\_\_\_\_  
TITLE/POSITION: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Designation (Choose ONE):  Attorney,  CPA,  LIN,  Trust Officer,  Financial Planner,  Other

## [NEW PROFESSIONAL ATTENDEE CRITERIA](#)

Young Professionals must be in one of the following professional fields:

1. Officers of trust companies or banks maintaining trust departments which are actively engaged in trust or estate operations and administration;
2. Chartered Life Underwriters;
3. Attorneys;
4. Certified Public Accountants;
5. Financial Planners with a CFP or ChFC designation;
6. Other Professionals engaged in a field of estate planning that the Board finds appropriate for inclusion in the Council.

Applicants for young professional meeting registrations must have significant current involvement in one of the six enumerated categories and must have prior experience in one or more qualifying categories aggregating less than five years. Additionally, each applicant must provide a reference, preferably a current member of CEPC.

**Please Check All That Apply**

- I have reviewed the Young Professional criteria printed above.
- I have significant current involvement in one or more of the five enumerated categories aggregating less than five years. Please describe
- I have significant current involvement and prior experience which includes in whole or in part category 6 aggregating less than five years. Please describe.

I believe that I meet the qualifications for a Young Professional Meeting attendee.

Date: \_\_\_\_\_

Applicant: \_\_\_\_\_

**Professional Reference**

I propose the above-named applicant has less than five years of professional experience in the estate planning field.

Date: \_\_\_\_\_

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

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

**RETURN APPLICATION: BY FAX: 513-563-9743 or EMAIL: cincycouncil@gmail.com**  
**MAIL TO: CEPC, 4010 Executive Park Dr., #100, Cincinnati, OH 45241**  
**Questions, please call 513-554-3074**