
2019 Membership Application

The annual membership dues for 2019 are **\$250**

Renewing Membership

New Membership

Please provide all information below even if you are renewing:

Name: _____ Title: _____

Firm: _____

Address: _____

City/Zip: _____

Office: _____ Mobile: _____

FAX: _____ Social Media: _____

Website: _____

E-Mail: _____

(Our organization utilizes e-mail for a significant portion of our member communications)

Discipline:

___ CPA/Tax ___ Legal ___ Financial Planning/Investments ___ Fiduciary

___ Other: _____ (Please specify)

New and Renewing members please answer the following questions*:

1. I have been actively engaged in estate planning for _____ years.
2. I presently devote approximately _____% of my time and practice directly related to estate planning.
3. I maintain my place of business or main residence in Southern California: Yes _____ No _____

*YOU MUST MEET ALL THREE REQUIREMENTS FOR MEMBERSHIP APPROVAL.

Your Signature: _____ Date: _____

Please make checks payable to the
“Estate Planning Council of South Orange County”
Forward your check along with this statement to:

Tom Maruscsak Arbor Financial Group
22842 Via Cordova Dana Point, CA 92629
714-264-0962- tpm@arborfg.com