

**SAN FERNANDO VALLEY  
ESTATE PLANNING COUNCIL**

*Established 1962*

*Member— NAEPC*

**Membership Application**

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

Home Address: \_\_\_\_\_  
*Street City State Zip*

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

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

Phone  
Numbers: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
*Office Fax Home Cell*

E-Mail Address: \_\_\_\_\_ Website http: \_\_\_\_\_

Professional Category:  CPA  Attorney  CLU  CFP  PFP  ChFC  CEA  
 Actuary  Trust Officer  Other \_\_\_\_\_

Name of Sponsor: \_\_\_\_\_ *Phone #*

Tell us about your Estate Planning experience?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What courses have you taken in Estate and/or Financial Planning?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are you actively employed in Estate and/or Financial Planning?  
\_\_\_\_\_  
\_\_\_\_\_

For what reasons would you like to join this organization?  
\_\_\_\_\_  
\_\_\_\_\_

How did you hear of this organization?  
\_\_\_\_\_

Applicant: I hereby certify that the above information is correct, that I am applying to the San Fernando Valley Estate Planning Council for membership. I realize that admission to this organization is based upon acceptance by the board of directors and that no discrimination will be based upon: age, sex, race, nationality, sexual orientation, disability, etc.

Applicant Signature: \_\_\_\_\_ Date \_\_\_\_\_  
For Board Use Only:

Accepted  
 Declined

By \_\_\_\_\_ Date \_\_\_\_\_

**Submit Completed Application to:**  
LARRY WEINER, Flans & Weiner, Inc.  
16200 Ventura Blvd., Ste. 417  
Encino, CA 91436  
Tel: 818-501-4888  
Fax: 818-783-7875  
l.weiner@flansweiner.com