



MEMBERSHIP APPLICATION



MEMBERSHIP BENEFITS INCLUDE

8 Council Meetings
4 Dinner and 4 Breakfast Meetings



Continuing Education Credits
Subject to Availability



Access to Study Group Meetings
Which include NAEPC Webinars



HOW TO APPLY ONLINE

Our application is now digital! Before applying, review our Council By-Laws to ensure you meet the participation requirements. After completing all three steps below, your application will be reviewed by our Membership Committee. Please allow up to 30 days for processing and decision.

1. Complete the Online Registration Form

- Navigate to the [Application Form](#) on the Council Website
- Complete all questions and answer thoroughly



2. Submit Non-Refundable Application Fee Online

- Navigate to the [Member Payments](#) section on the Council Website
- Select "Membership Application Fee: \$25" and complete payment



3. Written Endorsement from 2 Members

- Send a link to the Membership [Endorsement Form](#) to 2 Council members in good standing to complete and e-sign on your behalf

Estate Planning Council of Long Island is affiliated with the National Association of Estate Planners & Councils and joining can fulfill the requirement of belonging to an affiliated local estate planning council to become an Accredited Estate Planner® (AEP®) designee. Please contact the national office at 866-226-2224 to learn more about the Accredited Estate Planner® designation.



COUNCIL BY-LAWS

ESTATE PLANNING COUNCIL OF LONG ISLAND, INC.

BY-LAWS

ARTICLE I ORGANIZATION

Name
Section 1.01 The name of this not-for-profit corporation shall be **ESTATE PLANNING COUNCIL OF LONG ISLAND, INC.**

ARTICLE II OBJECTIVES

Objectives
Section 2.01 The objectives of the Council are:
To provide the best information available upon subjects of current interest to the members of the Council; to provide a medium for the discussion of common problems; to promote acquaintanceship and cooperation among the members of the Council to the end that the public may be better served. Members are encouraged to network with other members within the Council, but the use of the membership list for the solicitation or sale of products or services to other members is strictly prohibited. The Council shall be advisory in character and shall have no power to bind its members in any action or conclusions not provided for in these by-laws.

ARTICLE III MEMBERSHIP

Membership and
Qualifications
for Admission
Section 3.01 (a) The principal qualifications for admission to the Council include, but are not limited to, experience, background and demonstrated interest in estate planning, as well as good standing and reputation within his or her profession and community, which qualifications shall be evaluated by the Board of Directors based on the recommendation of the Membership Committee in the case of each applicant for membership.
(b) An applicant for membership shall meet all the qualifications prescribed in Section 3.01(a) and the following requirements for each individual discipline, all present membership not being affected:

(i) For admission as a certified public accountant, the applicant must be a practicing certified public accountant, licensed by the State of New York.

(ii) For admission as an attorney, the applicant must be a practicing member of the Bar of the State of New York.

(iii) For admission as a trust professional, the applicant must be employed by a bank, trust company or other institution having trust powers, who is engaged in fiduciary, wealth or asset management, and who may hold and be practicing with the professional designation of Certified Trust and Financial Advisor (CTFA).

(iv) For admission as an accredited financial planner, the applicant must hold and be practicing in one or more of the following professional designations: chartered life underwriter (CLU), chartered financial consultant (ChFC), certified financial planner (CFP) or Chartered Advisor in Philanthropy (CAP).

(c) An applicant who would otherwise qualify for admission to the Council under Section 3.01(a), but for the requirements of Section 3.01(b), may, in the sole discretion of the Board of Directors, be admitted to the Council, provided his or her principal duties involve:

(i) activity and participation in the estate planning or related fields; or

(ii) the education or training at the college or university level of persons pursuing a course of studies designed to lead to a degree, license or employment which will make said person eligible for admission to the Council; or

(iii) the writing, editing, or publishing of material at a professional level in a recognized national publication.

(d) In addition to the requirements contained in Section 3.01, paragraphs (a), (b) and (c) hereinabove, the applicant must either (i) maintain an office or be employed in an office in Nassau, Queens, or Suffolk County, or (ii) maintain an office or be employed in an office within New York State and be a resident of Nassau, Queens or Suffolk County.

Membership and
Qualifications
For Admission
As Associate
Member
Section 3.02

(a) Notwithstanding the foregoing, for those individuals who have met the requirements as contained in Section 3.01 (b) or (c) but possesses less than three (3) years of experience in estate planning, may apply for membership as an Associate member in the Council.

(b) Notwithstanding the foregoing, any individual who (i) shall be employed by an accounting firm, law firm, financial institution, insurance company, financial planning or services company (including for all purposes as a sole practitioner) and (ii) be engaged in the estate planning or related field at some level, but who does not satisfy the requirements for admission to the Council as contained in Section 3.01(b), may apply for membership as an Associate member in the Council, provided that the applicant is in the process of attaining a license, degree, professional designation or certification in his or her chosen field which would, upon completion, satisfy the requirements for admission to the Council as contained in Section 3.01(b).

(c) An applicant for Associate membership shall meet all the qualifications prescribed in Section 3.02, which qualifications shall be evaluated by the Board of Directors based on the recommendation of the Membership Committee in the case of each applicant for Associate membership.

(d) Associate members may, in the sole discretion of the Board of Directors, be admitted to the Council, and shall have all the benefits of membership, except Associate members shall not be eligible to vote, sponsor new members or hold office. In no event shall a person be permitted to remain an Associate member for more than five (5) years, consecutive or otherwise. If an Associate member wishes to become a regular member at any time, he or she shall reapply for full membership under Section 3.01, without paying the application fee as outlined in Section 9.03.

(e) In addition to the requirements contained in Section 3.02(a) and (b), the applicant must either (i) maintain an office or be employed in an office in Nassau, Queens, or Suffolk County, or (ii) maintain an office or be employed in an office within New York State and be a resident of Nassau, Queens, or Suffolk County.

**Membership and
Qualifications
For Admission
As Student
Member**
Section 3.03

(a) An applicant for Student membership shall be enrolled full-time in law school, graduate school or as a junior or senior at an accredited college or university within New York State and be a resident of Nassau, Queens or Suffolk County. The applicant must have a demonstrated interest in estate planning, as well as good standing and reputation within his or her school and community, which qualifications shall be evaluated by the Board of Directors based on the recommendation of the Membership Committee in the case of each applicant for Student membership.

(b) Student members may, in the sole discretion of the Board of Directors, be admitted to the Council and shall have all the benefits of membership, except Student members shall not be eligible to vote, sponsor new members or hold office. In no event shall a person be permitted to remain a Student member for more than four (4) years, consecutive or otherwise. If a Student member wishes to become an Associate member at any time, he or she shall reapply for Associate membership under Section 3.02 provided he or she has demonstrated continued interest in estate planning, without paying the application fee as outlined in Section 9.03. Annual dues and/or charges to attend Council meetings and events for Student membership shall be determined at the sole discretion of the Board of Directors.

(c) An applicant for admission for Student membership shall complete an application form prescribed by the Board of Directors. The application must be signed by the applicant and must be endorsed by a professor or teacher at the student's school, affirming the student's demonstrated interest in estate planning. Such endorsement must contain specific knowledge of the applicant.

Admission Procedure

Section 3.04

(a) An applicant for admission shall complete an application form prescribed by the Board of Directors. Except for applications for Student membership as outlined in Section 3.03 (c), the application must be signed by the applicant and must be endorsed by two (2) members in good standing. Each member's endorsement must contain specific knowledge of the applicant. The complete application, along with the application fee as outlined in Section 9.03, shall be forwarded to the Chairperson of the Membership Committee. Within fifteen (15) days of receipt of a complete application by the Chairperson of the Membership Committee, copies of that application shall be circulated to the members of that Committee, who will, prior to the next scheduled meeting of the Board of Directors, vote upon the applicant's admission.

(b) If the application for membership is approved by a majority vote of the Membership Committee, the Board of Directors shall consider the application at its next scheduled meeting after the action of the Membership Committee. The Board of Directors shall act on such an application by a vote of two-thirds (2/3) of the Board of Directors present at the meeting. Notice of the Board's action shall be communicated forthwith to the applicant. If an applicant is approved for membership by the Board of Directors, notice of such approval shall be communicated to the general membership prior to the next scheduled meeting.

(c) An applicant shall become a member of the Council entitled to notice of attendance at meetings upon qualification as aforesaid upon paying the dues as provided for in Section 9.01.

(d) The determination of the Board of Directors shall be final, but a rejected applicant may submit a new application after at least twelve months subsequent to the rejection of the application.

ARTICLE IX DUES AND FEES

Dues

Section 9.01

The dues for membership in the Council shall be such amount as the Board of Directors may determine annually by resolution and shall be payable at or before the regular meeting of the Council held in September of each year, for the fiscal year next ensuing. Any member whose dues have not been paid by the due date will be charged the guest fee for his or her attendance at any Council meeting, a portion of which may, at the discretion of the Board, be credited against his or her membership dues when paid. Notwithstanding the foregoing, any member approved for membership on or after February 1st of any fiscal year shall not be required to pay dues for that fiscal year but shall be required to pay the guest fee for his or her attendance at any Council meeting for the balance of that fiscal year.

Assessments

Section 9.02

The Board of Directors may, in addition to the annual dues, propose a special assessment to be levied upon the members for any purpose consistent with the objectives of the Council, if approved by a vote of two-thirds (2/3) of the members attending a regular or special meeting of the Council, provided fifteen (15) days' notice of said meeting containing said proposal as an agenda item is given to the entire membership. The special assessment shall be payable upon rendition of a bill, therefore.

Application Fee

Section 9.03

Each applicant for membership of the Council shall pay a non-refundable application fee in an amount fixed by the Board of Directors from time to time, which shall be payable at the time that his/her application is submitted to the Chairperson of the Membership Committee for consideration.