

**Centre Region Estate Planning Council  
Membership Application**

**Type of Membership:**

New Member                  Renewing Member

**Dues Level:**

Individual (\$75)                  Firm/Corporate (\$250)                  (maximum of five members\*)

*\*Firm/Corporate Dues: please include complete membership form with payment*

Individual Member Name: \_\_\_\_\_

Individual Title: \_\_\_\_\_

Individual Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Licenses and Designations Held: \_\_\_\_\_

Education: \_\_\_\_\_

Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

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

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Member 1 Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

Licenses and Designations Held: \_\_\_\_\_

Education: \_\_\_\_\_

Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

Member 2 Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

Licenses and Designations Held: \_\_\_\_\_

Education: \_\_\_\_\_

Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

Member 3 Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

Licenses and Designations Held: \_\_\_\_\_

Education: \_\_\_\_\_

Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

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Member 4 Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
Licenses and Designations Held: \_\_\_\_\_  
Education: \_\_\_\_\_  
Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

Member 5 Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
Licenses and Designations Held: \_\_\_\_\_  
Education: \_\_\_\_\_  
Purpose for Joining: \_\_\_\_\_ Years in Business: \_\_\_\_\_

**Check One Area of Estate Planning Specialty:**

- LEGAL
- ACCOUNTING
- DEVELOPMENT
- FINANCIAL SERVICES
- TRUST
- OTHER

Make Checks Payable to *Centre Region Estate Planning Council* and mail to:

**Centre Region Estate Planning Council**  
c/o Kerry Tolton, Treasurer  
210 West Hamilton Ave Box 314  
State College, PA 16801

Questions?

General: Julia Phillips, President, at [Julia.Phillips@kishbank.com](mailto:Julia.Phillips@kishbank.com)  
Membership/Dues: Kerry Tolton, Treasurer, at [Kerry@centrefoundation.org](mailto:Kerry@centrefoundation.org)  
Events: Tye Cressman, Events, at [Tye@lovicskylaw.com](mailto:Tye@lovicskylaw.com)  
Drew Wetzel, Events, at [Drew@goKFP.com](mailto:Drew@goKFP.com)