

Western Connecticut Estate & Tax Planning Council, Inc.

Existing Member Renewal - September 2018 through May 2019

ALL INFORMATION IS SAME AS LAST YEAR... to avoid completing information below CHECK BOX and FILL IN YOUR NAME ONLY!

To update/change your information please complete information below accordingly.

NAME: _____
TITLE: _____
FIRM: _____
STREET ADDRESS: _____
CITY, STATE & ZIP: _____, _____
PHONE: _____ FAX: _____
EMAIL: _____
WEBSITE: _____

MEMBERSHIP DIRECTORY CATEGORY: (PLEASE CHECK ONE BOX)

<input type="checkbox"/> Accountant	<input type="checkbox"/> Attorney:
<input type="checkbox"/> CFP®	<input type="checkbox"/> Life Insurance
<input type="checkbox"/> Trust Officer	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Investing:	

MEMBER OPTIONS: (CHECK ALL THAT APPLY)

<input type="checkbox"/>	PLEASE INCLUDE IN MEMBER DIRECTORY
<input type="checkbox"/>	Please send meeting announcements to me by Email.
<input type="checkbox"/>	I prefer to receive meeting announcements by U.S. Mail.

Make sure company description's are APPROVED/COMPLIANT WITH YOUR COMPANY!

If you do not want to include a description CHECK BOX – and we'll print, "Please visit us at our website and your web address!"

DESCRIPTION of your company and/or services you provide (**NO MORE THAN 50 WORDS WILL BE PERMITTED**): _____

Submit Application and Payment by OCTOBER 1st, 2018, to be in Member Directory!

- Networking and knowledge sharing among professional specialties
- Best Practices: sharing of best practices among your peers
- Expert presentations on contemporary estate planning issues
- Membership Directory and website
- Free Access to Leimberg Website (\$300 value)
- Four dinner meetings included in the cost of annual membership

2018 -2019 DUES \$175.00

Due Upon Receipt! Checks Payable to WCETPC, Inc. and Mail to:

Joan H. Lucia, WCETPC Administrator
36 Huntington Road, Newtown, CT 06470
Phone: 203-270-9602 or
Email: wctpcdanbury@gmail.com