**NEW MEMBERSHIP FORM**

**PIONEER VALLEY ESTATE PLANNING COUNCIL**

The objectives of the Council are:

1. To provide a better understanding of the services that attorneys, life underwriters, trust officers, accountants, financial planners and other service providers can render to clients.
2. To increase the public’s awareness of facilities and services available in the Pioneer Valley.
3. To aid individuals in planning and settling their estates. And to focus on specific topics in the elder planning arena.
4. To promote cooperation among estate planning professionals, and to foster a better understanding of the proper relationship that each group bears to the others, to their clients and to the general public.

The Council meets four times a year - three dinners that include an educational presentation and one breakfast that gives members an opportunity to speak about relevant topics. The three dinner meetings are held during an evening in the fall, winter and early spring, with our annual “Potpourri Breakfast” held in the late spring. Member dues are $45 per year, payable in the fall. The cost of dinner is usually $35, payable when reservations are made for each meeting.

If you wish to apply for membership, please print or type:

**Full Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(First, Middle(or initial), Last, Suffix)*

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

**Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Website: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Specialty: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(i.e. attorney, accountant, etc*) ---- ***Can specify up to 4***

**Designations:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(i.e. Esq., CPA, CFP, etc.)*

**Please return this information, along with a $45.00 membership fee payable to Pioneer Valley Estate Planning Council, to:**

Katie Buckingham, Administrative Assistant

Ostberg & Associates

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Phone: (413) 586-6725

Fax: (413) 585-9564

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We look forward to hearing from you!