ESTATE PLANNING COUNCIL
OF METRO LOUISVILLE
Where Estate Planning Professionals Connect, Learn, and Lead.

MEMBERSHIP APPLICATION

We bring together trusted professionals from across disciplines to elevate estate planning in Greater Louisville through expert education and collaboration — enhancing our members' skills and strengthening the financial well-being of the clients we serve, while helping them achieve their personal, financial, and charitable goals.

Name Title

Company

Mailing Address

City State Zip Code

Telephone E-Mail

Classification of Membership (circle one):

- Attorney
- Certified Public Accountant
- Chartered Financial Consultant or Chartered Life Underwriter
- Bank or Trust Company Officer
- Employee Benefits Consultant or Actuary
- Certified Financial Planner
- Officer of Community Foundation of Louisville or Community Foundation of Southern Indiana

Endorsers (*two required, both must be active members in good standing and from different firms*):

Name:
Endorser Classification:
Signature:

Name:
Endorser Classification:
Signature:

To be elected to membership, an applicant must receive the affirmative vote of a majority of the Executive Committee. Applicants will be notified following the next Executive Committee Meeting (July 21, 2025; October 16, 2025, December 18, 2025; February 19, 2026; April 23, 2026).

Return completed application to: tnaples@epcml.org