

Objective and Nature of the Council

The objectives of the Council are:

To promote cooperative efforts in the field of estate planning among the professions and businesses represented by its members.

To assist its members in keeping abreast of laws and other developments in the field of estate planning through meetings and the dissemination of information so as to continuously improve the estate planning services provided by its members.

To promote respect for, and an understanding of, the relationships and functions in the field of estate planning of the professions and businesses represented by its members.



Lake Michigan Estate Planning Council
C/O Gary L. Rasmussen, C.P.A.
Brickley DeLong, PC
316 Morris Ave, Ste 500
P.O. Box 999
Muskegon, MI 49443-0999
Phone: (231) 726-5850
Fax: (231) 726-5851
Email: grasmussen@brickleydelong.com

Lake Michigan Estate Planning Council

Invitation To Membership

Lake Michigan Estate Planning Council
316 Morris Ave, Ste 500
P.O. Box 999
Muskegon, MI 49443-0999
(231) 726-5850

www.lmepc.com

2017-2018 Board of Directors

Karmen Gearhart

karmen.gearhart@lpl.com
President
231-733-1122

Sueann Mitchell

sueann@ggtmlaw.com
Vice President
231-747-7160

Gary Rasmussen

grasmussen@brickleydelong.com
Treasurer
231-726-5850

Maureen Brading

maureen@myfocusfinancial.com
Secretary
231-739-5751

Membership Roster

A roster of the membership of the Council listing the names, addresses, discipline, and the telephone number of the current members, and segregated by membership groups is distributed to each member each year.

Membership Dues

Annual membership dues are \$60, which includes your admission to our four membership events per year, with the exception of other expenses, which may include, but not limited to dinner, golf, theatre tickets, etc.

Guests are always welcome to come to events at an additional charge.



Lake Michigan Estate Planning Council Membership Application

Membership Qualifications

Name: _____
 Company: _____
 Address: _____
 City: _____ State: _____
 Phone: _____ Fax: _____
 E-mail: _____

I am a: Attorney CPA CLU Trust Officer
 Planned Giving CFP Instructor Judge

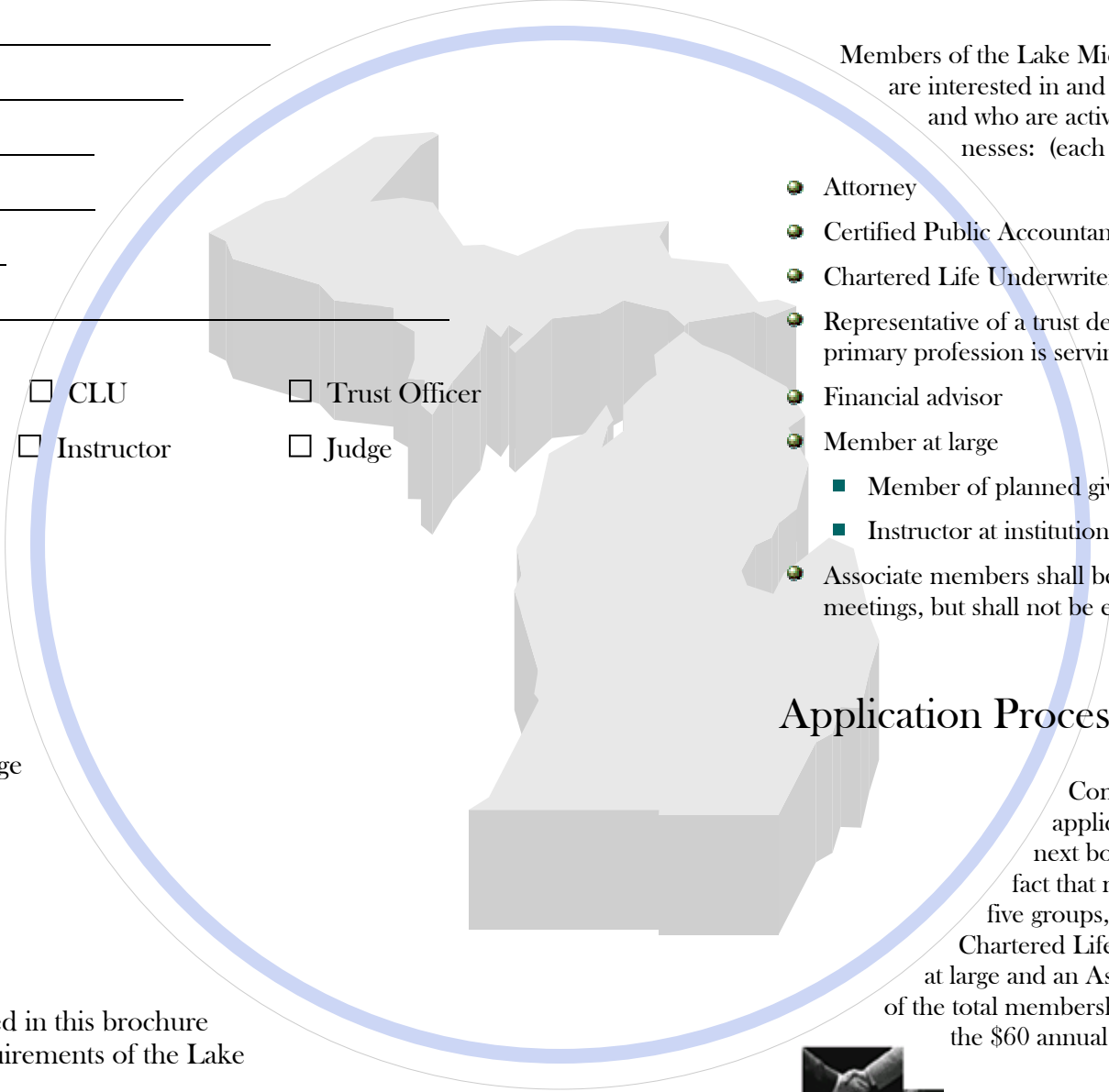
Business Professional History: (Briefly summarize the past 5 years of your business and professional career—attach separate page if necessary)

Civic/Community Activities—attach separate page if necessary:

I understand all of the membership qualifications listed in this brochure and hereby certify that I fulfill these membership requirements of the Lake Michigan Estate Planning Council (LMEPC).

Applicant Signature

Date



Members of the Lake Michigan Estate Planning Council consist of persons who are interested in and actively practicing estate planning in Western Michigan, and who are actively practicing in one of the following professions or businesses: (each profession is limited to 15 voting members)

- Attorney
- Certified Public Accountant
- Chartered Life Underwriter
- Representative of a trust department of a financial institution or whose primary profession is serving as a fiduciary
- Financial advisor
- Member at large
 - Member of planned giving department of a non-profit organization
 - Instructor at institution of higher education
- Associate members shall be entitled to receive notice of and can attend all meetings, but shall not be entitled to vote or hold offices.

Application Process

Complete the membership application as directed. Your application will be reviewed by the Board of Directors at the next board meeting for approval. Approval is considered by the fact that membership must consist of persons from each of the five groups, which include Attorney, Certified Public Accountant, Chartered Life Underwriter, Trust officer, Financial advisor, Member at large and an Associate member. No one group may exceed one-third of the total membership. At that time you will be notified and invoiced for the \$60 annual membership dues.



Working Together to Help Families Preserve Their Wealth
 During and After Their Lifetime