

## Omaha Estate Planning Council Application for Membership

Applicant's Name: \_\_\_\_\_

Company: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Cell: \_\_\_\_\_ (meeting reminders via text notification)

### I. Alternative Universal Membership Requirements For All New Members

\_\_\_\_ I have substantially worked in some estate planning area for at least the previous five (5) years, the last two (2) of which have been in the Omaha, Nebraska metropolitan area, and I have attained the following degrees or certifications (*check all that apply*): \_\_\_\_ JD, \_\_\_\_ CPA, \_\_\_\_ LL.B., \_\_\_\_ LL.M. (Tax), \_\_\_\_ CFP®, \_\_\_\_ CLU®, \_\_\_\_ M.P.A., \_\_\_\_ CFA, \_\_\_\_ ChFC®, \_\_\_\_ CPWA®, \_\_\_\_ CAP®, \_\_\_\_ CSPG, \_\_\_\_ CTFA, \_\_\_\_ MSFS, \_\_\_\_ MST, \_\_\_\_ MBA., \_\_\_\_ PhD. (*PhD.—Indicate Area(s) of Study*) \_\_\_\_\_.

\_\_\_\_ In lieu of the credentials listed above, I have substantially worked in some estate planning area for at least the previous ten (10) years, the last two (2) of which have been in the Omaha, Nebraska metropolitan area. (See Article V, Section 2 of Bylaws).

### II. Professional Industry Group Membership Requirements

**Certified Public Accountant Certification** \_\_\_\_ I hereby certify that: (i) I am a certified public accountant licensed by the State of Nebraska; and (ii) I am actively engaged in the practice of certified public accounting in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(a) of Bylaws).

**Attorney Certification** \_\_\_\_ I hereby certify that: (i) I am a practicing member of the Bar of the State of Nebraska; and (ii) I am actively engaged in the practice of law in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(b) of Bylaws).

**Trust Officer Certification** \_\_\_\_ I hereby certify that: (i) I am actively engaged with bank(s) or trust company(ies) as a trust officer doing business in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(c) of Bylaws).

**Financial Planner Certification** \_\_\_\_ I hereby certify that: (i) I have met substantially all educational and experience requirements to keep current and active the designations identified above; and (ii) I am actively engaged with a financial planning institution in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(d) of Bylaws).

**Philanthropic Advisor Certification** \_\_\_\_ I hereby certify that: (i) I have met substantially all educational and experience requirements to keep current and active the designations identified above; and (ii) I am a philanthropic advisor professional who represents charitable nonprofit corporations, foundations or development offices in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(e) of Bylaws).

**Life Insurance Professional Certification** \_\_\_\_\_ I hereby certify that: (i) I have met substantially all educational and experience requirements to keep current and active the designations identified above; and (ii) I am actively engaged in the life insurance business in the Omaha, Nebraska metropolitan area. (See Article V, Section 3(f) of Bylaws).

I hereby certify that the above information and certifications by me are true and correct.

\_\_\_\_\_  
Member Applicant Signature

\_\_\_\_\_  
Print Name

**III. Member Recommendations**

I hereby recommend the above applicant as a member of the Omaha Estate Planning Council.

\_\_\_\_\_  
Sponsoring Member #1 Signature

\_\_\_\_\_  
Print Name

I hereby recommend the above applicant for membership of the Omaha Estate Planning Council.

\_\_\_\_\_  
Sponsoring Member #2 Signature

\_\_\_\_\_  
Print Name

***Please include the following documents to support application for membership:***

- Resume
- Bio
- Letter of Recommendation from Sponsoring Member #1
- Letter of Recommendation from Sponsoring Member #2

Membership applications are accepted throughout the year to be reviewed each spring by the Membership Committee, who utilizes a set of prescribed guidelines such as, but not limited to, experience, background, education and demonstrated interest in estate planning, as well as good standing and reputation within his or her profession and community, and taking into account the current membership, needs, demographics and mission. Based on recommendations of the Membership Committee, applicants are admitted into membership by the Board of Directors.

Please submit completed Membership Application to:

Stacie Sarasio, Council Executive

[Stacie@OmahaEstate.org](mailto:Stacie@OmahaEstate.org)

PO 641461

Omaha, NE 68164

Ver. – 03/2025