



2025 Membership Updates

In an effort to simplify the membership process for the Council, the Executive Committee has made a few changes that we hope will make things easier on every member.

In the past, membership was prorated depending on when during the year that member joined. Moving forward we will be renewing membership in the month they joined each year. For example, members joining in February can expect to be invoiced the following year in February.

The Council also has decided to include the lunch costs into the membership dues so that there is no need to worry about paying separately prior to the quarterly meeting. It is only requested that the member let us know if they would be attending the meeting so the room can be set up appropriately.

Also new this year, each member is welcome to bring a guest with them to one of our quarterly meetings. This is a great way to help build the Council membership and increase networking connections for our members.

Lastly, the Council has added a Corporate Membership for those firms who have more than 3 individuals joining the Council. When joining under the Corporate Membership option, each member will still need to submit their information in order to make sure they are listed in the Estate Planning Council directory correctly.

The Council has great programming planned for the 2025 year including an opportunity for after-hours networking. Looking forward to seeing everyone at the February 2025 quarterly meeting.

2025 MEETING SCHEDULE

*Meetings will be hosted at Fiores Café
2327 S. Pine Street, Ocala, FL 34471*

February 19, 2025

May 21, 2025

August 20, 2025

November 19, 2025



2025 Estate Planning Council Membership Application

Individual Membership Dues:

\$225 (includes meals and opportunity for a guest to attend one meeting during the year)

Name: _____

Professional Designation:

- Attorney Certified Public Accountant (CPA) Certified Financial Planner (CFP)
 Chartered Life Underwriter (CLU) Registered Investment Advisor (RIA)
 Chartered Financial Consultant (CFC) Trust Officer Accredited Estate Planner
 Other (please specify) _____

Firm/Employer's Name: _____

Address: _____

Work Phone: _____ Cell Phone: _____

Email Address: _____

Company Website: _____

Years of Practice: _____

Corporate Membership Dues: 3 or more members from same firm

\$200 per person (includes meals and opportunity for each member to bring a guest to one meeting during the year)

1. Name: _____

Professional Designation:

- Attorney Certified Public Accountant (CPA) Certified Financial Planner (CFP)
 Chartered Life Underwriter (CLU) Registered Investment Advisor (RIA)
 Chartered Financial Consultant (CFC) Trust Officer Accredited Estate Planner
 Other (please specify) _____

Email Address: _____

Work Phone: _____ Cell Phone: _____

Years of Practice: _____

2. Name: _____

Professional Designation:

- Attorney Certified Public Accountant (CPA) Certified Financial Planner (CFP)
 Chartered Life Underwriter (CLU) Registered Investment Advisor (RIA)
 Chartered Financial Consultant (CFC) Trust Officer Accredited Estate Planner
 Other (please specify) _____

Email Address: _____

Work Phone: _____ Cell Phone: _____

Years of Practice: _____

3. Name: _____

Professional Designation:

- Attorney Certified Public Accountant (CPA) Certified Financial Planner (CFP)
 Chartered Life Underwriter (CLU) Registered Investment Advisor (RIA)
 Chartered Financial Consultant (CFC) Trust Officer Accredited Estate Planner
 Other (please specify) _____

Email Address: _____

Work Phone: _____ Cell Phone: _____

Years of Practice: _____

Firm/Employer's Name: _____

Address: _____

Company Website: _____

Make Checks Payable to the Community Foundation for Ocala/Marion County
and mail to:

The Estate Planning Council of Marion County
c/o The Community Foundation for Ocala/Marion County
324 SE 24th Street
Ocala, Florida 34471

For Credit Card Processing, please contact our offices directly at (352) 622-5020.
Please note that a convenience fee is applied to credit card payments.

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