

MERRIMACK VALLEY
Estate Planning Council

Application for Membership

Please complete this form and mail it to: President (for address information please refer to the Officers tab at the website www.mvepc.com.
Please make checks payable to "Merrimack Valley Estate Planning Council, Inc."

Name		Title	
Firm			
Address			
City		State	Zip
Business Phone	Home Phone		Fax
Email		Web Site	

Occupation (check all that apply)

Attorney at Law CPA Financial Planner Life Insurance Agent Trust Officer Other

Professional Qualifications
List services you perform, categories of clients you serve, and your area of specialization

Education
List undergraduate, graduate and professional degrees (use additional sheet if necessary)

MERRIMACK VALLEY
Estate Planning Council

Application for Membership

Employment History

List all relevant experience, beginning with current employment (use additional sheet if necessary)

Organizations

List professional/fraternal organizations to which you belong; state if you are or have been an officer or director; include dates (use additional sheet if necessary)

Miscellaneous

Please provide any additional information that may be of interest to the membership (awards, publications, etc.)

Speakers Bureau

The council is considering the establishment of a Speaker's Bureau. Area organizations would be notified of our willingness to speak on Estate Planning. If you wish to participate, please list topics you would like to present.

I hereby apply for membership to the Merrimack Valley Estate Planning Council, Inc.
I agree to conform to the provisions of its By-Laws

Signature: _____ Date: _____

Endorsement (new members only)

Signature of two (2) current members requires (one must be a member of the Executive Board)

Member: _____

Member: _____

MERRIMACK VALLEY
Estate Planning Council

Application for Membership

Please complete this form and mail it to:

Ken Anding

Boston Partners Financial Group

138 River Road, Suite 310

Andover, MA 01810

Questions: kanding@bostonpartnersllc.com

**Annual Dues are \$250.00 and cover the period from August through July.
Add an additional \$25.00 for your website listing.**

Applications received after January 1 will be prorated for the current term.

Make checks payable to "Merrimack Valley Estate Planning Council, Inc."