
Eligibility for Central Arizona Estate Planning Council

Persons eligible for membership in the corporation are as follows:

1. Members of the State Bar of Arizona;
2. Certified Public Accountants or Public Accountants licensed in the State of Arizona;
3. Enrolled Agents licensed by the Internal Revenue Service;
4. Trust Officers (employees of corporate fiduciaries engaged in the administration of Trusts and Estates) meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-Laws of the corporation, including, but not limited to those holding the CTFA designation;
5. Life Insurance professionals meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those: (a) with five years' experience; (b) Chartered Life Underwriters (CLU); (c) current of life members of the Million Dollar Round Table; or (d) members of the Association of Advanced Life Underwriters;
6. Money Managers and Financial Planners meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those with the following designations: Chartered Financial Analysts (CFA); Certified Financial Planners (CFP); Chartered Financial Consultants (ChFC), Accredited Estate Planners (AEP); Certified Financial Managers (CFM), Certified Estate Planning Specialists (CEPS); or Master of Financial Services (MSFS);
7. Actuaries who are Enrolled Actuaries under the Employee Retirement Income Security Act of 1974;
8. Planned Giving Professionals meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those holding the CFRE designations;
9. Appraisers meeting the qualifications as to background, experience and education the Board may from time to time provide in the By-laws of the corporation, including, but not limited to those holding the ASA designation;
10. Such additional members or categories of members as the Board may from time to time provide in the By-laws of the corporation or as the Board grants specific approval.