Membership information

About the Council

The Estate Planning Council of Simcoe County (EPCSC) is a not-for-profit organization for professionals who advise the public on different aspects of estate planning and administration. The EPCSC presents a regular program of continuing education and networking meetings for its members, who share a commitment to professional growth through education and interdisciplinary cooperation.

Program

For the 2022-2023 Membership year, the EPCSC will hold at least two dinner meetings and two virtual meetings from September to August to share experiences and ideas. At each meeting we invite a keynote speaker to present on a current topic related to estate planning and administration. Your membership includes the cost of a meal at each dinner meeting, to be held at a suitable venue. Dinner meetings will generally be two hours in length, with virtual meetings not exceeding one and a half hours in length.

Membership terms run from September 1 to August 31of each year.

How to Apply for Membership

****For the 2022 - 2023 membership year annual membership dues are being reinstated at $175 per year. New members are asked to pay in addition to the annual membership dues a one time $100 fee.****

1. Check page 2 of this document to ensure that you meet our membership requirements. The requirements are not exhaustive. If you have questions, please contact a member of the Board to discuss further.
2. Obtain sponsorship from an existing member. If you do not know one, please contact a member of the Board for help – our contact information is attached.
3. Complete and sign the application on page 4 of this document.
4. Submit your application to the Membership Coordinator via email.
5. On approval of application, submit your payment of the $100 initiation fee and $175 annual membership dues to the Treasurer via e-transfer or cheque, details will be provided with approval.

Any questions can be directed to the Membership Coordinator, Bryan Adams, at bryan.adams@ca.gt.com.

Your application will be reviewed by the Board. We will process it as quickly as possible and notify you of our decision by E-mail.

Once your application has been approved, payment of the can be made via Interac e-transfer or by cheque (payable to Estate Planning Council of Simcoe County). Details will be provided in your membership approval E-mail.

Membership Eligibility

1. Live or work in Simcoe County
2. Have 5 years or more of professional experience relevant to estate planning and administration
3. Supply an E-mail address that we can use to communicate with you on an ongoing basis
4. Meet one of the following sets of category-specific requirements:

Category	Member in Good Standing of	Designation	Other Requirements
Accountant	CPA Ontario	CPA (CA, CGA or CMA)	-
Financial Advisor	Advocis or CIFPs or IAFP	CFP or RFP or CFA	-
Gift Planner	CAGP	-	A full time employee of a registered Canadian charity who is actively engaged in gift planning.
Insurance Advisor	Advocis and CLU Institute	CLU	-
Lawyer	Law Society of Upper Canada	LL.B. or J.D.	Member in good standing where a significant portion of his or her practice is estate planning, estate administration or estate litigation.
Funeral Home Owner/Manager	The Board of Funeral Services	-	-
Trust Professional	-	-	A full time employee practicing estate planning and/or estate administration with a trust company, chartered bank or credit union registered in Canada or Ontario.
Designated Other	-	-	Specific qualifications, knowledge or experience which the Board considers will contribute towards the advancement and development of the objectives of the Council.
Elder Care	-	-	A full time employee/employer working within health care service. May have RECP or other appropriate designation

Ultimate discretion as to whether an applicant is admitted to membership rests with the Board of Directors, which will endeavour to keep an appropriate professional balance and may require limiting membership in each membership category. Membership will be limited to 2 members of any one company, firm or association. Once admitted, regular members will be expected to attend at least two meetings a year.

Please note all members will be required to provide proof of membership in good standing with their governing professional body or a police record check in lieu thereof.

Current Board Members

Janice Mumberson Associate Lawyer – Barriston Law	(T) 705 792 6910 jmumberson@barristonlaw.com
Jackie Ramler, MBA, CFP®, RIA, CIM®, FCSI™, FMA Executive Wealth Advisors – Raymond James®	(T) 705 721 5919 jackie.ramler@raymondjames.ca
David L. Bumstead, CFP, CLU, CH.F.C., RHU, TEP Abex Private Wealth Management Inc	(T) 705 733 5392 David.Bumstead@pwmgroup.ca
Geoff Cook, CFP®, CHAIP Wealth Builder – Infinite Financial	(T) 705 797 4941 geoffcook@infinitefinancial.ca
Bryan Adams, CPA, CA Senior Manager, Tax – Grant Thornton LLP	(T) 705 797 3001 bryan.adams@ca.gt.com
Eric Dean Principal – Heronic Coach and Counsel	(T) 249-288-6232 edean@rogers.com
Samantha Hill Trust Officer – TD Wealth Private Trust	(T) 705-491-2880 samantha.hill@td.com

Application for Membership

This form is to be printed out and completed in **BLACK INK**. Please print clearly in **BLOCK CAPITALS**

Contact Information

Applicant Name: ______________________________
Last *First* *Middle Initial(s)*

Business Name: ______________________ Title ______________________

Address: ______________________ ______________
Street Address *Suite/Unit #*

____
City *Province* *Postal Code*

Telephone:

(   ) ______________________
Business

(   ) ______________________
Mobile

(   ) ______________________
Fax

Email (mandatory): ______________________

Membership Information

Category (primary focus of your practice):

- ☐ Accountant
- ☐ Elder Care
- ☐ Financial Advisor
- ☐ Funeral Home Owner/Manager
- ☐ Gift Planner
- ☐ Insurance Advisor
- ☐ Lawyer
- ☐ Trust Professional
- ☐ Designated Other

Brief Description of your Practice:

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Designation Held ______________ Sponsoring Member ______________

Attached with this application:

- ☐ Proof of membership in good standing; or
- ☐ Police record check

I confirm that I meet the membership requirements of the EPCSC and I agree to support its mission, to:

- Present a program of educational presentations for its members;
- Provide an interdisciplinary forum for members to discuss current issues in estate planning and associated topics;
- Stimulate and foster acquaintanceship and cooperative working relationships between members; and
- Promote community awareness of the benefits of proper estate planning.

As a Council Member, I give permission for my name, organization and contact information to be distributed in various media. I also give permission for any photos/videos of me that may be taken/recorded in connection with Council events to be used by the Council for publicity and information purposes.

Signature: ______________________ Date (dd/mm/yyyy) ______________________