



Established in 1986 and proudly incorporated into the Community Foundation for Ocala/Marion County in 2018, the Estate Planning Council of Marion County brings together attorneys, accountants, financial advisors, trust officers, insurance professionals, and others dedicated to excellence in estate planning.

Our mission is to foster collaboration, continuing education, and ethical practice among local professionals. Through quarterly meetings, seminars, and networking events, members share expertise, stay current on changing laws and financial trends, and strengthen the quality of estate and wealth planning throughout our community.

Membership in the Council offers valuable benefits including access to a network of peers, educational opportunities, and professional development designed to enhance client service and community impact.

Membership Highlights:

- **Renewal Process:** Dues renew annually in the month you joined. Lunch is included in your membership dues so no separate payment is required. Members are simply asked to RSVP before each meeting for planning purposes.
- **Bringing a Guest:** Each member may bring one guest to one quarterly meeting per year. This is a great way to introduce potential new members and expand professional networks.
- **Corporate Membership:** Available for firms with three or more members joining. Each individual enjoys full membership benefits and is listed in the Council directory.

The Estate Planning Council of Marion County continues to advance professional excellence and strengthen our community through shared learning and collaboration. We invite you to join us and be part of a network dedicated to building a stronger future for our clients and our community.

2026 MEETING SCHEDULE

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

February 18, 2026
May 20, 2026
August 19, 2026
November 18, 2026



2026 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:

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:

Email Address:

Work Phone: _____ Cell Phone: _____

Years of Practice:

2. Name: _____

Professional Designation:

Email Address: _____

Work Phone: _____ Cell Phone: _____

Years of Practice: _____

3. Name: _____

Professional Designation:

Email Address: _____

Work Phone: _____ Cell Phone: _____

Years of Practice: _____

Firm/Employer's Name: _____

Address: _____

Company Website: www.abc.com

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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