

Houston Business & Estate Planning Council

2025 Membership Guidelines

The Houston Business & Estate Planning Council (The” HBEPC”) maintains an active membership of approximately 150 persons, with a limit on the number of active members in each of the following categories as determined annually by the board of the HBEPC.

- 1) Attorneys
- 2) Certified Public Accountants
- 3) Chartered Life Underwriters, Chartered Financial Consultants, Certified Planners/Consultants, Chartered Financial Analyst and Business Valuation Experts with one or more of the following designations: ASA, CVA, AVA, CBA, CPA/ABV.
- 4) Trust Officers of a bank or trust company authorized to do business in the state of Texas.

Applicants for membership should have:

- 1) Been designated an attorney, Certified Public Accountant, Chartered Life Underwriter, Chartered Financial Consultant, Certified Financial Planner/Consultant, Chartered Financial Analyst and Business Valuation Experts with one or more of the following designations: ASA, CVA, AVA, CBA, CPA/ABV or Trust Officer for at least six years.
- 2) Spent at least 40% of their time in at least three of the last five years (one of which must be the most recent) on at least one of the following activities:
 - Business Planning
 - Estate Planning
 - Probate
 - Administration of Estates and Trusts
 - Tax Matters Incident Thereto
 - Valuation Services

For questions or more information, please contact the board Membership Chairman, Terrell Taylor at ttaylor@christtaylor.com or (713) 850-7747.