



Professional Fiduciary Council of Florida

Loyalty - Integrity - Trust

Individual/Provisional Membership Application Checklist

Name: _____

Those applying for Individual or Provisional Membership must submit all of the following items, which must be attached or otherwise submitted with the completed Membership Application:

- Copy of Florida Driver's License
- Proof of Professional Liability Insurance (minimum of \$500,000.00 coverage required)

*If this is a provisional membership application this requirement may be waived.

- Copies of any Professional License(s)/Certificate(s)
- Three (3) letters of reference from professionals that play an active role in your fiduciary services, e.g., professional fiduciaries, attorneys, trust officers, certified public accountants, and members of the judiciary. Letters of reference must include how the professional knows you, how they are related to your fiduciary services and why they recommend that you be accepted into the Council.

**If applicant is a professional guardian, at least one reference must come from a member of the judiciary, which includes judges and magistrates.

- Non-refundable Application Fee (\$50.00)
- Completed/Signed Application

Council may require additional information or have additional inquiries prior to membership decision. Council is limiting the number of applications approved in 2020 and therefore application may be rolled over to next application term.

Mail Application and Checklist to:

Professional Fiduciary Council of Florida
3637 4th Street North #270
Saint Petersburg, Florida 33704

For Council Use Only:

Date Received: _____ Initials: _____

Membership Approved Date: _____

Type of Membership:

- Individual Member

Provisional Member