

## Life Membership Application

TAAO Life Membership is a privilege and an honor earned based on an individual's service to TAAO at the state and/or local level. Upon approval, Life Members do not pay annual membership dues and receive a reduced registration fee for the annual conference (as long as retirement status does not change).

Due to the benefits and prestige of Life Membership, applications are reviewed by the Board of Directors, who approve and deny Life Member status based on the merits of each application. This review takes place once per year, at the board meeting held in conjunction with the annual conference.

### MINIMUM REQUIREMENTS

Per Section 4.3 of the TAAO bylaws, an individual must meet the following minimum requirements to be eligible for nomination as a Life Member:

- Is a current Active or an Affiliate Member and has been in good standing of the Corporation for not less than ten (10) years,
- reached retirement age, and
- retired from the assessing profession prior to the annual meeting of the Corporation or have been made a Life Member by action of the Institute of Certified Tax Administrators.

*Individuals who continue working in the assessing profession, whether in the private or public sector, are not eligible for life member status until they have retired from the assessing profession.*

### ADDITIONAL REQUIREMENTS

For a Life Membership Application to be considered by the Board of Directors, applicants must:

- answer "Yes" to at least 3 questions on the application,
- provide requested supporting information below each question answered "Yes",
- submit a signed letter of recommendation addressing the applicant's involvement in TAAO, contributions to the tax profession, and/or service to his/her local community or employer; the letter may be from the applicant's employer at time of retirement, a local chapter officer, **or** the region director, and
- return completed application and letter of recommendation to TAAO for receipt no later than **July 20, 2026**.

### Applicant Information

<b>Full Name:</b>	
<b>CTA Member:</b> YES                  NO	<b>Other Designations:</b>
<b>Home Address:</b>	
<b>City, State, ZIP:</b>	
<b>Phone:</b>	<b>Email:</b>
<b>Retired From (<i>employer</i>):</b>	
<b>Title at Retirement:</b>	
<b>Date of Retirement:</b>	<b>Years of Tax Industry Experience:</b>
<b>Years of TAAO State Membership:</b>	<b>Years of Chapter Membership:</b>

**Has the applicant:**

<b>1. Served as member of the state Board of Directors?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Position</b>		
<b>2. Served in a leadership role of a local chapter?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Chapter &amp; Position</b>		
<b>3. Served on any committees at the state level for at least 5 years (cumulative)?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Committee &amp; Position Held</b>		
<b>4. Served on any committees at the local level for at least 5 years (cumulative)?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Committee &amp; Position Held</b>		

<b>5. Taught courses for TAAO as a PTAD- or BTPE-approved instructor?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Courses Taught</b>		
<b>6. Presented at TAAO annual conferences or workshops?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Topics Presented</b>		
<b>7. Received awards or honors from TAAO at the state or local level?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Award / Honor Received &amp; Organization Given By</b>		
<b>8. Received industry, work or community awards or honors?</b>		<b>YES</b>	<b>NO</b>
<b>Time Period</b>	<b>Award / Honor Received &amp; Organization Given By</b>		

