

2010-2011 MEMBERSHIP APPLICATION

I hereby apply for membership in the **Society of FSP** and the _____ Chapter.

Name _____ Nickname _____ Birth Year _____ Last 4 Digits of SS# (optional) _____

Designations/Degrees Held (required) _____ Designations/Degrees Pursuing (if applicable) _____

Firm/Agency (University if Student) _____ Primary Company Affiliation _____ Broker-Dealer _____

Mailing Address _____

City _____ State _____ Zip+4 _____

E-Mail Address* _____ Business Phone _____ Fax _____

Referring Member's Name (if applicable)

I agree to be governed by the Bylaws of the Society and the Chapter and conform to the Code of Professional Responsibility (to review go to our Web site and click on 'About FSP'). I understand I have a self-reporting responsibility under this code.

NATIONAL DUES Required	<input type="checkbox"/> Regular \$263.00 <input type="checkbox"/> Full-time Professor \$131.50	<input type="checkbox"/> Young Professional \$197.25 <input type="checkbox"/> Associate \$131.50	<input type="checkbox"/> Student \$33.00 <i>See reverse side for descriptions.</i>	\$
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CHAPTER DUES Required	For Chapter dues call 1-800-392-6900 or visit the Visitors Center at www.financialpro.org and click on Membership Info for the Local Chapter List.	\$
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SECTION(S)

Your first Section is free. Add one additional Section for \$35 or as many as you like for just \$60.

- | | | |
|--|--|---|
| <input type="checkbox"/> Bus. & Comp. Planning | <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Qualified Plans |
| <input type="checkbox"/> Employee Benefits | <input type="checkbox"/> Investment Management | <input type="checkbox"/> Retirement Counseling |
| <input type="checkbox"/> Estate Planning | <input type="checkbox"/> Leadership & Management | <input type="checkbox"/> Risk Management: <i>Life, Health, Disability, Casualty & Liability Insurance</i> |

*You must provide your e-mail address to access Section benefits. **TOTAL SECTIONS DUES** \$

SUBTOTAL \$

Pay by Bank Draft or Check and receive a discount (see below). -

TOTAL AMOUNT DUE \$

**PAY BY
BANK DRAFT
OR CHECK
AND SAVE!**

Regular members can save \$10 off their national dues.

All other membership categories (Retired, Associate, Full-time Professors, Young Professionals, and Students) can save \$5 off their national dues amount if paying by Bank Draft or Check.

PAYMENT OPTIONS (pay by Bank Draft or Check and save – see box at left)

- Check made payable to the Society of FSP.
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- One-Time Bank Draft**
- Monthly Bank Draft, see reverse side for instructions.** Bank Name _____
- 9-Digit Routing/Transit # _____
- Checking Account # _____
-

- Credit Card** VISA MC AMEX Discover

Card Number _____ Exp. Date _____

Signature (Required for Bank Draft and Credit Card payment)

Please complete this application and forward with payment to:

FAX: 610-527-1499

MAIL: Society of FSP
c/o Beneficial Bank
PO Box 8315
Phila., PA 19101-8315

ONLINE: www.financialpro.org

PHONE: 800-392-6900
Mon.-Fri.
9:00 am–4:30 pm ET

Duplicate dues payments are refunded automatically. Overpayments will be credited to your account or refunded upon request.

For more information, visit www.financialpro.org or call Member Services at 800-392-6900.

FSP NATIONAL MEMBER TYPES AND DUES

Note: All members must pay applicable Chapter dues. Contact Member Services at 800-392-6900 for additional Chapter information and local dues.

Regular (\$263) – Professionals eligible for regular membership: CASL®, CEBS®, CFA®, CFP®, ChFC®, CIMA®, CLF®, CLU®, CPA, CPC, CPCU®, CTFA, Enrolled Actuary, JD, Graduate Degree in Financial Services (MS, MSFS, MSM, MBA, PhD), REBC® & RHU®.

Young Professional (\$197.25) - For new members who are age 30 or younger meeting the requirements of regular membership. The Young Professional dues rate is for new members only and is available for the first two consecutive years of membership only and a one time basis. After the two-year consecutive period membership will be reclassified as a Regular Member.

Full-time Professor (\$131.50) - Full-time professors at accredited colleges and universities are eligible for this category.

Retired/Disabled (\$131.50) – Members who consider themselves retired and (a) attained 65 yrs. of age and a minimum of 15 yrs. Membership; or (b) their attained age and yrs. of membership add up to 80 or greater. A person who is retired due to a total disability can apply for Disabled membership. The requirement for a minimum of 15 years of membership is waived for disabled applicants.

Associate (\$131.50) – Financial professionals who have passed at least one course towards one of our eligible designations and/or graduate degrees. The eligible designation or degree must be obtained within 10 years of first year of membership in FSP. Those with LUTCF, FSS, or FLMI credentials are eligible for membership in this category.

Student (\$33) – Full-time students in a degree program at an accredited college or university. National dues provide for Web benefits only. Restrictions apply.

SECTIONS

Included with your FSP membership is one free Professional Interest Section. You may join one additional Section for \$35 or join as many as you like for just \$60. Members can use e-mail and the FSP Web site to access current and archived newsletters and participate in the electronic discussion groups.

Note: Your e-mail address is required to receive Section newsletters and to participate in the electronic discussion groups. Newsletters are formatted for easy printing from your computer.

DEDUCTIBILITY

A portion of your dues provides a one-year subscription to the *Journal of Financial Service Professionals*. Members may not deduct the subscription price from dues.

Contributions to the Society's Foundation are deductible as a charitable contribution for federal tax purposes. FSP dues are not deductible as a charitable contribution for federal tax purposes, but may be deductible as a business expense.



www.financialpro.org
800-392-6900

PAY BY BANK DRAFT OR CHECK AND SAVE!

Pay by Bank Draft or Check and save with the Society's new Cash Discount Program. Regular members can save \$10 off their national dues. All other membership categories (Retired, Associate, Full-time Professors, Young Professionals, and Students) can save \$5 off their national dues amount if paying by Bank Draft or Check.

BANK DRAFT INFORMATION

The Bank Draft payment option allows you to break down your FSP membership dues and Foundation contribution into monthly installments. You can also make a one-time payment.

To take advantage of the Bank Draft option:

1. Provide a void check, or write your bank name, the 9-digit routing/transit number and your checking account number in the payment area of this form. **Do not send a payment or deposit slip.**
2. Sign the front of this form.
3. For installments, your monthly payment may be estimated by taking your adjusted total dues payment and Foundation contribution amount, divide by 12 (months).
4. You will receive an e-mail of confirmation.
5. Draft Date, on/or after the 20th of each month.

Note: Bank Draft can also be used to pay membership dues online at www.financialpro.org

Your Name Address City, State, Zip	1001	
	DATE _____	
PAY TO THE ORDER OF	\$ <input type="text"/>	
	DOLLARS	
FOR		
I:123456789:I	0000123456321	1001
Routing/Transit Number (Required)	Account Number (Required)	Check Number (Do not include)

Important Information

Membership runs October 1 through September 30. If you are a renewing member and elect to pay your dues by monthly Bank Draft after October, the first draft will reflect the amount from October to your start date. After the initial draft, your monthly charge will level off to the amount determined in the calculation from step #3 above. When a new membership year starts, you will receive notification of your monthly draft amount. Should you wish to discontinue the Bank Draft agreement, return that notification to FSP and notify your bank. If you change bank accounts, please notify FSP's Member Services Department at 1-800-392-6900 to obtain a new Authorization Agreement form.

Authorization Agreement for Monthly Preauthorized Bank Draft Payments

By signing the dues application, I (we) hereby authorize the Society of Financial Service Professionals, hereinafter called FSP, to initiate monthly debit entries or a one-time debit for total dues payment to my (our) Checking account via the Automated Clearing House system. The monthly debit entries will be in accordance with FSP's notice of National, Chapter, professional interest Section dues, and Foundation contributions and procedures for monthly preauthorization bank draft payment. This authority is to remain in full force and effect until FSP and the Member's bank have received written notification from me (or either of us) of its termination in such manner as to afford FSP and the Member's Bank a reasonable opportunity to act on it.

Note: You can opt to use the Bank Draft method to pay a one-time annual dues payment or choose to break down your FSP membership dues into monthly installments.