



2009-2010 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 (found on the Society's Website under the Ethics tab) of the Society of FSP. I understand I have a self-reporting responsibility under this code.

NATIONAL DUES Required	<input type="checkbox"/> Regular \$244	<input type="checkbox"/> Young Professional \$183	<input type="checkbox"/> Student \$30.50	\$
	<input type="checkbox"/> Full-time Professor \$122	<input type="checkbox"/> Associate \$122	<i>See reverse side for descriptions.</i>	

CHAPTER DUES Required	For Chapter dues call 1-800-392-6900 or visit our Web site at www.financialpro.org and click on the Membership Info tab.	\$
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SECTION(S) One Section is included with your membership. Join one additional Section for \$35 or as many as you like for just \$60. Check boxes of additional Sections you would like to join and add for total amount due. <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	\$
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TOTAL AMOUNT DUE	\$
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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. FSP dues are not deductible as a charitable contribution for federal tax purposes, but may be deductible as a business expense.

PAYMENT OPTIONS

Enclosed is a check for \$ _____ made payable to the Society of FSP.

Credit Card: VISA MC AMEX Discover for \$ _____

Card Number _____ Exp. Date _____

Bank Draft Option Bank Name _____

is available, see reverse side for instructions. 9-Digit Routing/Transit # _____

Checking Account # _____

Signature (Required for autodraft and credit card payment)

Please complete this application and forward with payment to:

Fax (Credit Cards Only)
610-527-1499

Society of FSP
c/o Beneficial Bank
PO Box 8315
Philadelphia, PA 19101-8315

Online
www.financialpro.org

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 (\$244) – Professionals eligible for regular membership: CASL®, CEBS®, CFA®, CFP®, ChFC®, CLF®, CLU®, CPA, CPC, CTFA, Enrolled Actuary, JD, Graduate Degree in Financial Services (MS, MSFS, MSM, MBA, PhD), REBC® & RHU®.

Young Professional (\$183) - 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 (\$122) - Full-time professors at accredited colleges and universities are eligible for this category.

Retired/Disabled (\$122) – 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 (\$122) – 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 (\$30.50) – 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.



www.financialpro.org
800-392-6900

FSP EASY PAY INFORMATION

The BANK Draft payment option allows you to break down your FSP membership dues and Foundation contribution into monthly installments.

To take advantage of the Bank Draft option:

1. Include 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. **Please do not send a payment or deposit slip.**
2. Sign the front of this form.
3. 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 a letter of confirmation.

Your Name Address City, State, Zip	1001
	DATE _____
PAY TO THE ORDER OF	\$ _____
	DOLLARS
FOR	
⌈:123456789⌋:⌈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 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 #2 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. Draft Date, on/or after the 20th of each month. 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 Preauthorized Bank Draft Payments

By signing the dues application/invoice, I (we) hereby authorize the Society of Financial Service Professionals, hereinafter called FSP, to initiate monthly debit entries 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.