

# MEMBERSHIP APPLICATION

Membership is valid for one-year from acceptance into the Society of FSP.



I hereby apply for membership in the Society of FSP and the \_\_\_\_\_ Chapter.



Name	Nickname	Birth Date (optional/required for young professional discount)
Designations/Degrees Held	Designations/Degrees Pursuing	Licenses
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.

<b>NATIONAL DUES</b> Rates are valid from July 1, 2017–June 30, 2018	<b>\$</b>
Required <input type="checkbox"/> Regular \$380.00 <input type="checkbox"/> Associate \$190.00 <input type="checkbox"/> Premier \$1,920.00 <input type="checkbox"/> Student \$48.00 <input type="checkbox"/> Young Professional \$190.00 <input type="checkbox"/> Retired \$190.00 <i>See reverse side for descriptions.</i>	

<b>CHAPTER DUES</b> For Chapter dues call 1-800-392-6900 or visit national.SocietyofFSP.org/dues.	<b>\$</b>
Required	

<b>SECTION(S)</b> 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: Life, Health, Disability, Casualty & Liability Insurance	
<b>*You must provide your e-mail address to receive Section e-newsletters.</b>	<b>Total Sections Dues</b>
	<b>\$</b>

**PAYMENT OPTIONS**

**Check** payable to the Society of FSP (One-time full amount)

**Credit Card**  VISA  MC  AMEX  DISC

One-Time Full Amount  Two Installments  Monthly Auto Renewal\*\*

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

**E-Check**

One-Time Full Amount  Two Installments  Monthly Auto Renewal\*\*

9-Digit Routing # \_\_\_\_\_ Acct. # \_\_\_\_\_

Signature \_\_\_\_\_

*\*\*See reverse side for monthly auto renewal terms.*

<b>Subtotal</b>	<b>\$</b>
<b>Total Due</b>	<b>\$</b>

Sign-up Online:  
[www.SocietyofFSP.org](http://www.SocietyofFSP.org)

Call Member Services at:  
800-392-6900  
M-F 9:00 am–4:30 pm ET

**Or, complete this application and forward with payment to:**

Fax: 610-527-1499  
Credit Card and E-Check Only

Mail: Society of FSP  
PO Box 71205  
Phila., PA 19176-6205

## FSP NATIONAL MEMBER TYPES AND DUES

Note: All members must pay applicable National and Chapter dues. Contact Member Services at 800-392-6900 for additional Chapter information and local dues, or visit [www.SocietyofFSP.org/dues](http://www.SocietyofFSP.org/dues).

### **REGULAR** (\$380.00 + Chapter Dues)

Professionals eligible for regular membership: AEP®, 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® & RICP®.

### **YOUNG PROFESSIONAL** (\$190.00 + Chapter Dues)

For members who are age 40 or younger meeting the requirements of regular or associate membership. After attaining age 41 they will be reclassified as either a Regular or an Associate Member.

### **RETIRED/DISABLED** (\$190.00 + Chapter Dues)

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** (\$190.00 + Chapter Dues)

A financial service professional recommended by a regular Society of FSP Member AND has any of the following: Five years of experience OR pursuing one of our eligible designations/graduate degrees OR holds a Series 6, 7, 63, 65 or 66 license.

### **STUDENT** (\$48.00 + Chapter Dues)

Full-time undergraduate students in a degree program at an accredited college or university. National dues provide for Web benefits only. Restrictions apply.

## PREMIER MEMBERSHIP

### **PREMIER MEMBERSHIP** (\$1,920.00)

Open to all who meet membership eligibility requirements. Includes national and local dues and select FSP national event registration and product fees. (Note: does not include Chapter event fees.) For more information visit [national.SocietyofFSP.org/premier](http://national.SocietyofFSP.org/premier) or contact Member Services at 800-392-6900 or at [info@SocietyofFSP.org](mailto:info@SocietyofFSP.org).

## 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 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.

### **\*Authorization agreement for E-Check/Credit Card Auto Renewal**

By selecting one of these payment options, you (the member) hereby authorize FSP to initiate e-checks or credit card charges. The Bank Account/Credit Card listed will be automatically debited/charged every month. If your e-check is returned by the bank you will be contacted by member services; benefits will resume as soon as the account is brought current. If a dues adjustment occurs, you will be notified in advance of any change to your monthly debit/charge. This authorization will remain in full force and effect until FSP receives written notification from you of its termination.



[www.SocietyofFSP.org](http://www.SocietyofFSP.org)  
[info@SocietyofFSP.org](mailto:info@SocietyofFSP.org)  
800-392-6900  
M-F 9:00-4:30 ET