

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)	Parent Company	
Mailing Address		
City	State	Zip+4
E-Mail Address	Business Phone	

Referring Member's Name (if applicable) _____

I agree to be governed by the bylaws of the Society of FSP and my Chapter and conform to the Code of Professional Responsibility (to review go to www.societyoffsp.org/AboutUs). I understand I have a self-reporting responsibility under this code.

NATIONAL DUES	Rates are valid from July 1, 2018–June 30, 2019	\$
Required	<input type="checkbox"/> Regular \$380.00 <input type="checkbox"/> Associate \$380.00 <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>

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

SECTIONS	One Section is free, join two or more for \$50.	
	<input type="checkbox"/> Employee Benefits <input type="checkbox"/> Financial & Retirement Planning <input type="checkbox"/> Practice Management <input type="checkbox"/> Estate Planning <input type="checkbox"/> Insurance & Risk Management	

You must provide your e-mail address to receive Sections e-newsletters. **Total Sections Dues** \$

	Total Due \$
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PAYMENT OPTIONS

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

Credit Card VISA MC AMEX DISC

One-Time Full Amount Monthly Auto Renewal*

Card # _____ Exp. Date _____

Signature _____

E-Check

One-Time Full Amount Monthly Auto Renewal*

9-Digit Routing # _____ Acct. # _____

Signature _____

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

Sign-up Online:
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 ANNUAL 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 national.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 (\$380.00 + 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 www.SocietyofFSP.org/premier or contact Member Services at 800-392-6900 or at info@SocietyofFSP.org.

SECTIONS

One free Professional Interest Section is included with your FSP membership. You may join two or more Sections for \$50. Members can use the FSP website 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.



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www.SocietyofFSP.org
info@SocietyofFSP.org
800-392-6900
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M-F 9:00-4:30 ET