

4 Reasons to Participate in MGI

Membership Growth Initiative

#1

MGI Keeps FSP Vital and Relevant

New members bring fresh ideas and new perspectives, adding to the value of your membership

#2

MGI Strengthens Your Network

Expanding your network is the first step in increasing your referrals

#3

MGI Helps Expand Your Knowledge, Increase Your Level of Client Service

Broader educational opportunities for a multidisciplinary membership elevate your client service

#4

MGI Reduces the Cost of Your Membership

Get a 20% reduction in national fees for each member you recruit

It's Easy to Get the Benefits of MGI

- New members receive a 25% discount on national fees
- Offer colleagues and coworkers a free 30-Day Guest membership
- Find other tips and techniques at www.national.SocietyofFSP.org/page/mgi





Who Is Eligible to Participate?

- All current FSP members are eligible to participate in the Membership Growth Initiative.

Who Counts as a New Member Recruit?

- Individuals who qualify for Regular, Young Professional, or Associate Membership who have never been a member of FSP; "Former" members who have been out of FSP membership for over 2 years will count.
- To be eligible for Regular membership an individual must hold one of these designations or degrees: AEP®, CASL®, CEBS®, CFA®, CFP®, ChFC®, CIMA®, CLF®, CLU®, CPA, CPC, CPCU®, CTFA, Enrolled Actuary, JD, RICP, Graduate degree in Financial Services (MBA, MS, MSFS, MSM, PhD), REBC®, RHU®, and RICP®.
- Young Professionals must meet eligibility criteria of Regular or Associate membership and be age 40 or younger.
- To be eligible for Associate membership, the individual must be recommended by a regular member and have any one of the following: 5 years' experience, OR pursuing one of our eligible credentials/degrees, OR holding a series 6, 7, 63, 65, or 66 license.
- Student and FSP Guest memberships do not count for the Membership Growth Initiative, nor do full-time professors who become members under the University Partners Program.
- Persons recruited in previous years do not count for the Membership Growth Initiative.

How Are Referrals/Recruits Tracked?

- Tracking occurs through the "REFERRED BY" field on all Membership Applications and the online application at www.SocietyofFSP.org.
- The recruiter's name must be entered in this field on applications or mentioned when joining by phone.

What Is the Timeframe?

- You will receive your credit on your next renewal.

If you have any further questions,
contact Member Services at
800-392-6900, or e-mail to info@SocietyofFSP.org.