

# 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](http://www.societyoffsp.org/AboutUs)). I understand I have a self-reporting responsibility under this code.

<b>NATIONAL DUES</b>	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>	
<b>CHAPTER DUES</b>	For Chapter dues call 1-800-392-6900 or visit <a href="http://www.SocietyofFSP.org/dues">www.SocietyofFSP.org/dues</a> .	\$
<b>SECTIONS</b>	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	
<b>You must provide your e-mail address to receive Sections e-newsletters.</b>		<b>Total Sections Dues</b>
		\$
<b>Total Due</b>		\$

## PAYMENT OPTIONS

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

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**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](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 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](http://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](http://www.SocietyofFSP.org/premier) or contact Member Services at 800-392-6900 or at [info@SocietyofFSP.org](mailto: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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