

FPA GROUP MEMBERSHIP

FIRM ENROLLMENT FORM

Thank you for your interest in FPA Group Membership – an easy and efficient way for your office to manage individual FPA memberships through one centralized point. Group membership offers a single consolidated invoice, and discounts. The firm pays an annual fee of \$250 which provides:

- 15% off individual FPA membership dues*
- 10% off FPA national conferences (FPA Annual Conference and the FPA Retreat)
- Free live webinars and six free on-demand webinars
- Use of FPA group member logo
- Plus all the benefits of individual FPA membership!

CREATING YOUR FPA GROUP MEMBERSHIP... IN 3 EASY STEPS

Step One: Complete the first two sections of the Group Membership Enrollment Form, including Group Firm and Group Administrator information. The role of the administrator is to make individual FPA membership updates and to facilitate payment of the consolidated invoice.

Step Two: Fill out the Member Information section by gathering pertinent information from current FPA members at your office as well as from individuals who would like to join FPA. If possible, please provide the FPA ID# for all current members. For any new members, please indicate the appropriate membership category from the list on the second page.

Step Three: Send the completed form by mail, fax, or email to the following:

- | | |
|---|---|
| ● Financial Planning Association Group Membership | ● Fax: 303.759.0749 |
| 1290 Broadway, Suite 1625 | |
| Denver, CO 80203 | ● Email: GroupMembership@OneFPA.org |

Once your paper work is received, an invoice will be sent to your administrator for all FPA discounted membership dues in your firm plus the annual \$250 Group Membership fee. Each year, you will receive your firm's Group Membership invoice with the names, FPA ID #'s, and discounted dues rates for all FPA members included in your Group membership account.

**Discount valid for CFP® Professional and Allied Professional membership dues only.
Not valid with any other offer, promotion, or discount.*

FPA MEMBER TYPES

CFP® Professional

FPA CFP® Professional Membership is for CFP® professionals who actively practice or support financial planning in the U.S., regardless of practice type or compensation method.

CFP® Candidate

This membership is for candidates for CFP® certification who have applied to CFP® Board to take the CFP® Certification Examination, but have not yet met all of CFP® Board of Standards' certification requirements. Members may hold this membership type for a maximum of 3 years or until CFP® certification is attained.

Allied Professional

This membership is for those who deliver personal financial services to the public or support financial planners in their practice.

Faculty

FPA Faculty Membership is for academics who teach full-time in a CFP® Board registered degree program, certificate program, or a related finance, business high school or degree program with the ultimate interest of supporting students who wish to pursue a career in the financial planning profession.

CFP® Certificant Student

FPA CFP® Certificant Student is for students who are enrolled in a CFP® Board certificate program with the ultimate interest of pursuing a career as a CFP® Professional. Members may hold this membership type for a maximum of 2 years or until they attain their CFP® certification.

Full-time Student

This membership is for students who are enrolled in a full-time graduate or undergraduate, finance or business-related degree program and plan to pursue a career in financial planning. Members may hold this membership type for a maximum of 4 years or until they attain their CFP® certification.

International Members

FPA International CFP® Professional Membership is for professionals who are involved in the practice and profession of financial planning and reside outside of the United States.

Member Emeritus

Member Emeritus status is available for members who have reached full retirement age (as defined by SSA) and whose primary profession was financial planning in our community. If employed as a business professional, they must work less than an average of 20 hours per week calculated on an annual basis.



Group Membership Application

Making Membership easier.

Group Membership enables firms to streamline FPA invoicing and updates.

GROUP FIRM INFORMATION

Firm Name		Principal / CEO Contact Information:		
Mailing Address:		City	State	Zip Code
Phone Number	Fax Number	Website		
Approximate # of Employees		Approximate # of Financial Planners		
Primary Reason for seeking FPA Group Membership				
How did you hear about FPA Group Membership				

GROUP MEMBERSHIP ADMINISTRATOR INFORMATION

Name	Title, Department
Phone Number	Fax Number
Email Address	

PLEASE FILL OUT FOR EACH CURRENT AND NEW MEMBER TO BE ADDED TO YOUR GROUP ACCOUNT:

FPA GROUP MEMBER ROSTER INFORMATION

Name	<input type="checkbox"/> Current FPA Member <input type="checkbox"/> New FPA Member		
Mailing Address (<i>if different from company address</i>)	FPA Member Number (<i>if current member</i>)		
City	State	Zip Code	Phone Number
Email Address			Date of Birth
FPA Membership Category			CFP ID #

Submit application and payment to:
Mail: 1290 Broadway, Suite 1625
Denver, CO 80203

Phone: 800.322.4237, opt. 2
Fax: 303.759.0749

Email: GroupMembership@OneFPA.org



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☐ New FPA Member

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