



FPA GROUP MEMBERSHIP

Making Membership Easier

FIRM/ORGANIZATION 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, specialized offerings, and discounts.

The group member firm pays an annual fee of \$250 which will provide them with the following:

- 15% off individual dues *
- 10% off FPA national conferences (FPA Annual Conference and the FPA Retreat)
- Recognition at the FPA BE and on FPA's website
- Use of FPA group member logo
- *Plus all the benefits of individual benefits!*

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

Step One:

Complete the first two sections of the Group enrollment form, including Group Firm/Organization and Group Administrator Information. The role of the administrator is to make individual 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 the FPA. If possible, please provide the FPA ID# for all current members. For any new members, please indicate the appropriate membership category they would fall into 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
7535 E. Hampden Ave. # 600
Denver, CO 80231



303.759.0749



GroupMembership@OneFPA.org

Once we receive your paper work we will send you an invoice for everyone's FPA discounted membership dues in your firm plus an annual \$250 group membership fee. Each year, you will receive your firms group membership invoice with the names, FPA ID #'s, and discounted dues rates for all FPA members included in your Group account.



Questions?

Please call our Group Specialists at 800.322.4237 option 2

* Offer valid for CFP Professional and Allied Professional membership types only. Not valid with any other offer, promotion, or discount



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Category	Description
CFP® Professional	A CFP® professional who actively practices or supports financial planning.
Allied Professional	For professionals who deliver personal financial services to the public and may use the financial planning process in their work and professionals who work directly with financial planners to support their practice of financial planning and/or their delivery of financial planning services to the public. (Not a CFP® certificant.)
Faculty	An academic who teaches 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 financial planning as a career.
CFP® Certificant	An individual enrolled in a CFP Board certificate program with a plan of pursuing a career as a CFP® professional. Members may only hold this membership type for a maximum of 2 years.
CFP® Candidate	A candidate for CFP® certification who has applied to CFP Board to take the CFP® Certification Examination, but who has not yet met all of CFP Board's certification requirements. Members may hold this membership type for a maximum of 3 years.
Full-time Student (graduate or undergraduate)	An individual enrolled in a full-time graduate or undergraduate finance or business registered or related degree program with a plan of pursuing a financial planning career. Members may only hold this membership type for a maximum of 4 years.
International	A professional who practices in the financial planning profession and currently resides <u>outside</u> the United States.
Member Emeritus (retired)	Available for members who have reached full retirement age (as defined by SSA) and, if employed as a business professional, work less than an average of 20 hours per week calculated on an annual basis.

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Group Membership Application

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Group membership enables firms and organizations to streamline FPA invoicing and updates.

GROUP FIRM / ORGANIZATION INFORMATION

Firm or Organization 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	FPA Member Number <i>(if current member)</i>		
City	State	Zip Code	Phone Number
Email Address	Date of Birth		
FPA Membership Category			

Submit application and payment to:

Mail: 7535 E. Hampden Ave, Ste 600
Denver, CO 80231

Phone: 800.322.4237, opt. 2
Fax: 303.759.0749

Email: GroupMembership@OneFPA.org



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