

# 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 (if applicable).



First Name \_\_\_\_\_ Last Name \_\_\_\_\_ Nickname \_\_\_\_\_ Birth Date (optional/required for young professional discount) \_\_\_\_\_

Designations/Degrees Held \_\_\_\_\_ Designations/Degrees Pursuing \_\_\_\_\_ Licenses \_\_\_\_\_

Firm/Agency/University \_\_\_\_\_ 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 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 FEES*</b> Required	Fees are valid from July 1, 2022–June 30, 2023 <input type="checkbox"/> Regular \$330.00 <input type="checkbox"/> Young Professional \$165.00 *Reflects 25% discount on national fees for new members only. <i>See reverse side for membership descriptions.</i>	\$
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<b>CHAPTER FEES</b> If applicable	For chapter fees call 1-800-392-6900 or visit <a href="http://www.SocietyofFSP.org/fees">www.SocietyofFSP.org/fees</a> .	\$
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<b>JOURNAL**</b>	Subscription included with membership fee; choose preferred format: <input type="checkbox"/> Print (includes access to digital edition) <input type="checkbox"/> Digital only	
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<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	
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**Total Sections Fees** \$

**A valid e-mail address is required for all digital publication delivery.	<b>Total Due</b>	\$
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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](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 ANNUAL FEES

Members pay national fees and chapter fees if applicable. Contact Member Services at 800-392-6900 for additional chapter information and chapter fees, or visit [national.SocietyofFSP.org/fees](http://national.SocietyofFSP.org/fees).

**MEMBER** (\$440.00 + chapter fees, if applicable)

Professionals eligible for 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®. In addition, financial service professionals with 3 years experience OR who hold a series 6, 7, 63, 65, or 66 license OR who are pursuing one of our eligible designations or degrees OR who are recommended by a member in good standing are eligible for membership.

**YOUNG PROFESSIONAL** (\$220.00 + chapter fees, if applicable)

For members who are age 40 or younger meeting the requirements of membership.

**STUDENT** (\$50.00 + chapter fees, if applicable)

Full-time students in a degree program at an accredited college or university. National fees provide for web benefits only. Restrictions apply, call for details.

## 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 with the current dues rate (New rates effective July 1 each year). A dues receipt will be sent each month via email. 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. This authorization will remain in full force and effect until FSP receives written notification from you of its termination.



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