



INVESTMENTS & WEALTH INSTITUTE®

formerly **IMCA**

CONFERENCE REGISTRATION

2019 BEHAVIORAL ADVISOR FORUM

September 23-24, 2019 | The Palace Hotel | San Francisco

REGISTRATION INFORMATION

Name _____ Badge Name _____

Company _____

Address _____

City _____ State/Province _____ Zip/Postal Code _____

Phone _____ Fax _____ E-mail _____

Emergency Contact Name _____ Phone _____

Please note any special needs here _____

REGISTRATION FEES

	Early-Bird Rate ¹ Register by August 23, 2019	After August 23, 2019	Registration Total
<input type="checkbox"/> Member	\$795	\$895	
<input type="checkbox"/> Join & Go ² Join Investments & Wealth Institute to be eligible for this special rate. Rate includes conference registration and one-year membership (\$395).	\$995	\$1,095	
<input type="checkbox"/> Nonmember	\$1,245	\$1,345	
<input type="checkbox"/> Add Optional Pre-Conference Workshop: Practical Strategies for Managing Investor Behavior (September 22, 2:30-5:00 p.m.) <i>*Sponsored by Toews Corporation (Space is limited)</i>	\$0 (FREE)	\$95	\$ _____

¹ Both the registration form and payment must be received by August 23, 2019, to be eligible for the early-bird rate.

² Reactivations and renewals are not eligible. Conditions apply. Subject to change without notice. Membership is nontransferable and dues are nonrefundable.

Cancellation/Transfer Policy—Cancellations for conference registration must be received in writing. Please send cancellation requests to conferences@i-w.org. The registration fee less a \$50 cancellation/transfer fee will be refunded for requests received by September 6, 2019. A 30-percent cancellation fee will be applied for cancellations received between September 6 and September 15, 2019. Investments & Wealth Institute is unable to provide refunds or transfer registration fees to another event after September 15, 2019, or for no-shows.

You will receive an email from the Investments & Wealth Institute conference team confirming receipt of your request; if you do not receive an email with this confirmation within 24 business hours, please call +1 303-770-3377.

PAYMENT

Check (payable to Investments & Wealth Institute for the total amount) MasterCard VISA American Express Discover

Credit Card # _____ Exp. Date _____

Name on Card _____ Signature _____

CONTINUING EDUCATION

CIMA®/CPWA®/RMA® Marks—This program will offer up to 13 hours of CE credit by attending the pre-conference workshop and regular program. Program subject to change which may affect the type and total number of hours delivered. Please check www.investmentsandwealth.org/behavioral-advisor-forum for updated CE information.

CFP® certification, NASBA CPE, and other certifications/designations—Please visit the Investments & Wealth Institute website for further information—www.investmentsandwealth.org/behavioral-advisor-forum

SUBMIT / MORE INFO

Web—Register electronically by visiting the Investments & Wealth Institute website at www.investmentsandwealth.org/behavioral-advisor-forum

Mail—Mail your completed registration along with a check or credit card number to:
Investments & Wealth Institute, 5619 DTC Parkway, Suite 500, Greenwood Village, CO 80111

Fax—Fax your completed registration along with a credit card number to Investments & Wealth Institute at +1 303-770-1812.

E-mail—Complete this form electronically and select the “Submit” button.

Hotel, location, and travel information along with corporate participation policy are available online at:
www.investmentsandwealth.org/behavioral-advisor-forum