



NEW MEMBER APPLICATION

Mr. Mrs. Ms.

Primary Mailing Address: Business Home

Last Name: _____ First Name: _____ Middle Initial: _____

Title: _____ Business Name: _____

Business Address: _____

City/State or Province: _____ State: _____ Zip/Postal Code: _____ Country: _____

Business Phone: _____ Business E-mail: _____

Business Fax: _____ Cell Phone: _____

Home Address: _____

City/State or Province: _____ State: _____ Zip/Postal Code: _____ Country: _____

Home Phone: _____ Home E-mail: _____

As a member of Investments & Wealth Institute, I understand that by providing my email address, I hereby consent and opt in to receive email communication sent by or on behalf of Investments & Wealth Institute. Membership dues are not refundable and not transferable. Your membership dues include a subscription to Investments & Wealth Monitor. Members may not deduct the subscription price from dues.

MEMBERSHIP DUES:

Membership Package Options (two-years): Basic: \$395 Signature: \$790 Elite: \$1,290

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

Credit Card #: _____ Exp: _____

Name on Card: _____ Signature: _____

Membership dues are not refundable and not transferable. Reactivations and renewals are not eligible for new member status.

DEMOGRAPHICS

How Did You Hear About The Investments & Wealth Institute: (check only one)

- Advertisement/Direct Mail/Email
- Company and/or Leadership
- Investments & Wealth Institute Conference
- Other Meeting or Conference
- Social Media or Website
- College/University
- Personal Referral
- Other (please specify) _____

Education: (check only one)

- High School
- Some College, No Degree
- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Law Degree
- Doctoral Degree
- Other _____

Your Primary Professional Responsibility: (check only one)

- Accountant
- Attorney
- Bank/Trust Officer
- Investment Consultant
- Corporate Officer
- Investment Analyst/Research
- Financial Planner
- Client Services
- Fund Trustee
- Pension Analyst
- Securities Broker
- Money Manager
- Wholesaler
- Wealth Manager/Advisor
- Other

Total assets under your advisement:

- (check only one)
- < \$50 M
 - \$50 M–\$150 M
 - \$150 M–\$250 M
 - \$250 M–\$500 M
 - \$500 M–\$1 B
 - > \$1 B
 - Not Applicable

Current Number of Clients you are Advising: _____

Your Firm Affiliation: (check only one)

- National Wire House
- Regional Broker Dealers
- RIA
- Bank/Trust
- National/Regional Independent
- Investment Management Wholesalers
- Industry Service Providers
- Money Managers
- Other

Types of Clients: (check all that apply)

- Individuals
- Corporations
- Public Funds
- Retirement/Pension
- Endowments, Foundations, Assn.
- Family Office
- Other

Your Designations: (check all that apply)

- RICP
- CFA®
- CFP®
- CPA
- Other

Your Experience: (check only one)

- 1–3 years
- 4–10 years
- 11–20 years
- 21 + years

Gender:

- Male
- Female
- Non-Binary
- Prefer not to answer

Date of Birth: _____

To apply:

Web—Apply electronically by visiting the Investments & Wealth Institute website at www.investmentsandwealth.org, and login to your dashboard.

Mail—Mail your completed membership form along with a check or credit card number to:

Investments & Wealth Institute
5619 DTC Parkway, Ste. 500
Greenwood Village, CO 80111

Fax—Fax your completed membership form 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 below.