INVESTMENTS & WEALTH INSTITUTE®
formerly IMCA

## 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: $395

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 & Welath Institute: (check only one)
- ☐ Advertisement
- ☐ Company and/or Leadership
- ☐ Direct Mail
- ☐ E-mail Promotion
- ☐ Investments & Welath Institute Conference
- ☐ Other Meeting or Conference
- ☐ Investments & Welath Institute Web site
- ☐ 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)
- ☐ CIMA®
- ☐ CIMC®
- ☐ CPWA®
- ☐ CFA®
- ☐ CFP®
- ☐ CPA
- ☐ Other

Your Experience: (check only one)
- ☐ 1—3 years
- ☐ 4—10 years
- ☐ 11—20 years
- ☐ 21 + years

Gender: (optional)
- ☐ Male
- ☐ Female

Age: (optional)
- ☐ 20—29
- ☐ 30—39
- ☐ 40—49
- ☐ 50—59
- ☐ 60—69
- ☐ 70+

### 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.

**SUBMIT**

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