



FPA OF SAN GABRIEL VALLEY MEMBERSHIP APPLICATION

THREE WAYS TO JOIN!

Online: www.OneFPA.org

Phone: 800-322-4237

Mail: 7535 E Hampden Ave
Suite 600
Denver, CO 80231

FPA MEMBERSHIP CATEGORIES

CFP® Professional **\$485**

A CFP® professional who actively practices or supports financial planning

Allied Professional **\$384**

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 **\$199**

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® Candidate **\$199**

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. (maximum 3 years).

CFP® Certificant **\$119**

An individual enrolled in a CFP Board certificate program with a plan of pursuing a career as a CFP® professional. (maximum 2 years).

Full-time Student **\$39**

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. (maximum 4 years).

For a full list of member benefits or to join online visit www.OneFPA.org/Membership/Benefits

FPA dues includes membership in your local FPA chapter. As a member of your local FPA chapter, you benefit from networking and sharing ideas with colleagues in your area, attending local educational programs and events and participating in leadership opportunities.

MEMBER PROFILE (please print or attach business card)

Name: _____ **Suffix:** _____

Company: _____

Title: _____

Street Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: _____ **Ext:** _____ **Fax:** _____

Email: _____

Date of Birth: _____

DESIGNATIONS (check all that apply)

CFP ChFC CLU CPA PFS CFA JD Other: _____

CFP Board Registration Number: _____ **Cert. Ex. Date** _____

PAYMENT DETAILS

Billing Address: *same as above?* Yes No

Street Address: _____

City: _____ **State:** _____ **Zip:** _____

Check (made payable to FPA)

VISA MasterCard American Express Discover

Total Amount: \$ _____

Cardholder Name: _____

Card Number: _____

Expiration Date: _____ **CVV:** _____

Signature: _____

Automatic Renewal? Yes No

TERMS AND CONDITIONS

Notice: FPA is required to inform you that \$21.37 of your dues applies to a Journal of Financial Planning subscription. This is not deductible from your dues. Dues, contributions or gifts to FPA are not deductible as charitable contributions for federal income tax purposes, but may be deductible as an ordinary and necessary business expense. However, a portion of the dues is not deductible as an ordinary and necessary business expense to the extent that FPA engages in lobbying. The non-deductible portion of dues related to lobbying for 2015-2016 is 4.53 percent.

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