



FPA GROUP MEMBERSHIP

(800) 322-4237

groupmembership@onefpa.org

financialplanningassociation.org

Enrollment Form

Why FPA Group Membership?

Thank you for your interest in FPA Group Membership—an easy and efficient way for your office to manage individual FPA memberships through one centralized point. For an annual fee of \$250, group membership offers a single consolidated invoice and discounts.

What Does My Firm Get as Part of Group Membership?

- 15% off individual FPA membership dues*
- 10% off FPA national conferences (FPA Annual Conference and FPA Retreat)
- Plus all the benefits of individual FPA membership!

Creating your FPA Group Membership...in 3 easy steps

Step One: Complete the first two sections of the Group Membership Enrollment Form, including Group Firm and Group Administrator information. The role of the administrator is to make individual FPA membership updates and to facilitate payment of the consolidated invoice.

Step Two: Fill out the Member Information section by gathering pertinent information from current FPA members at your office as well as from individuals who would like to join FPA. If possible, please provide the FPA ID# for all current members. For any new members, please indicate the appropriate membership category from the list on the second page.

Step Three: Send the completed form by mail, fax, or email to the following:

Financial Planning Association Group Membership

1290 Broadway, Suite 1625
Denver, CO 80203

Fax: (303) 759-0749

Email: groupmembership@onefpa.org

Once your paper work is received, an invoice will be sent to your administrator for all FPA discounted membership dues in your firm paperwork, plus the annual \$250 Group Membership fee. Each year, you will receive your firm's Group Membership invoice with the names, FPA ID numbers, and discounted dues rates for all FPA members included in your Group membership account.

*Discount valid for CFP® Professional and Allied Professional membership dues only. Not valid with any other offer, promotion, or discount.

FPA MEMBERSHIP TYPES

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CFP® Professional Member

You are a financial planning practitioner and have an active CFP® certification; you have held a position/role in the financial planning profession or financial services industry for five years or more.

Aspiring Financial Planner Member

You aspire to be a financial planning practitioner, but do not yet hold a position/role in the profession or financial services industry.

New to the Profession Financial Planner Member

You are a financial planning practitioner and have held a position/role in the financial planning profession or financial services industry for four years or less.

Allied Professional Member

You are:

- A non-CFP® financial planning practitioner and have been holding a position/role in the financial planning profession or financial services industry for 4+ years, OR
- Not a financial planning practitioner, but serving in a support role critical to the profession (i.e., compliance, operations, law/regulatory, tax planning, estate planning, marketing, communications, etc.).

Academic Member

You are an academic teaching full-time in a financial planning (or related field) graduate, undergraduate or high school degree, certificate or related program.

Member Emeritus

You are retired and financial planning was your primary profession.

International Member

This membership type is for CERTIFIED FINANCIAL PLANNER™ professionals who reside outside of the United States and are involved in the practice and profession of financial planning.



FINANCIAL
PLANNING
ASSOCIATION

Group Membership Application

Making Membership easier.

Group Membership enables firms to streamline FPA invoicing and updates.

Group Firm Information

Firm Name		Principal / CEO Contact Information:		
Mailing Address:		City	State	Zip Code
Phone Number	Fax Number	Website		
Approximate # of Employees		Approximate # of Financial Planners		
Primary Reason for seeking FPA Group Membership				
How did you hear about FPA Group Membership				

Group Membership Administrator Information

Name	Title, Department
Phone Number	Fax Number
Email Address	

Please fill out for each current and new member to be added to you group account:

FPA Group Member Roster Information

Name	<input type="checkbox"/> Current FPA Member <input type="checkbox"/> New FPA Member		
Mailing Address (if different from company address)	FPA Member Number (if current member)		
City	State	Zip Code	Phone Number
Email Address			Date of Birth
FPA Membership Category			CFP ID #

Mail: 1290 Broadway, Ste. 1625 Denver, CO 80203

Phone: (800)322-4237

Fax: (303)759-0749

Email: groupmembership@onefpa.org



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