

Three easy ways to apply:

Web—Apply electronically by visiting the IMCA Web site at [www.imca.org](http://www.imca.org), and then log in to My IMCA.

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

IMCA, 5619 DTC Parkway, Suite 500, Greenwood Village, CO 80111.

Fax—Fax your completed membership form along with a credit card number to IMCA at 303.770.1812.

IMCA<sup>®</sup>

investment  
management  
consultants  
association

## IMCA MEMBERSHIP APPLICATION

Mr.  Mrs.  Ms.

Primary Mailing Address:  Business  Home

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Business Name: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City/State or Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Home Address: \_\_\_\_\_

City/State or Province: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_ Country: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Business E-mail: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Home E-mail: \_\_\_\_\_

Fax: \_\_\_\_\_

As a member of IMCA, I understand that by providing my email address, I hereby consent and opt in to receive email communication sent by or on behalf of IMCA. Membership dues are not refundable and not transferable. Your membership dues include a one-year subscription to Investments & Wealth Monitor at a subscription cost of \$45. Members may not deduct the subscription price from dues.

## ANNUAL DUES \$395

Method of \$395 Payment:  Check (payable to IMCA for the total amount)  MasterCard  VISA  American Express  Diners Club  Discover

Credit Card #: \_\_\_\_\_ Exp: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

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## DEMOGRAPHICS

**How Did You Hear About IMCA:** (check only one)

- IMCA Advertisement
- Company and/or Leadership
- IMCA Direct Mail
- E-mail Promotion
- IMCA Conference
- Other Meeting or Conference
- IMCA Web site
- College/University
- Personal Referral (please provide name) \_\_\_\_\_
- 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<sup>®</sup>
- CIMC<sup>®</sup>
- CPWA<sup>®</sup>
- CFA<sup>®</sup>
- CFP<sup>®</sup>
- CPA
- Other

**Your Experience:** (check only one)

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

**Optional Membership Demographics:**

**Gender:**

- Male
- Female

**Age:**

- 20-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+