

# FEI Membership Application



*Invites you to*

**Celebrate** Our 80th anniversary, serving senior-level finance executives since 1931  
**Join** Today with a reduced app fee of only \$80 for new members\*  
**Attend** FEI's Summit at the Disney Contemporary Resort with our compliments

\*Reduced application fee does not apply to Associate Membership Category which has no application fee. Annual dues for new Associate Members remain reduced at \$395. Offer ends 12/31/2011.

I hereby apply for membership in Financial Executives International (please select a membership category).

Membership includes an annual subscription (\$69 value) for *Financial Executive* magazine (print and digital).

- Executive - \$575** (\$170 off application fee, \$495 annual dues renewal fee)
- Associate - \$395** (\$250 off application fee + \$100 discount, \$495 annual dues renewal fee)
- Academic - \$150** (annual dues only – no application fee)
- In-Transition - \$275** (\$170 off application fee, \$195 annual dues renewal fee)
- Government / Military - \$195** (annual dues only – no application fee)

Local Chapter dues may be additional and can range from \$50 to \$300 depending on the Chapter. Visit [www.financialexecutives.org/fly/chapterdues](http://www.financialexecutives.org/fly/chapterdues) for more information.

## business information

name \_\_\_\_\_

title \_\_\_\_\_

company name \_\_\_\_\_

company address \_\_\_\_\_

city \_\_\_\_\_ state \_\_\_\_\_ zip \_\_\_\_\_

business phone \_\_\_\_\_

business fax \_\_\_\_\_

business email\* \_\_\_\_\_ \* email required

**Nature of Entity**  public  private  non-profit  other

Industry \_\_\_\_\_ SIC No. \_\_\_\_\_

### Annual Revenue

- Less than \$25 Million
- \$25 to \$99 Million
- \$100 to \$499 Million
- \$500 to \$999 Million
- \$1 to \$5 Billion
- More than \$5 Billion

### Areas of Responsibility

- Accounting & Control
- Risk Management
- Tax Administration
- Planning & Development
- Treasury & Finance
- Information System
- Internal Audit

## personal information

name \_\_\_\_\_

home address \_\_\_\_\_

city \_\_\_\_\_ state \_\_\_\_\_ zip \_\_\_\_\_

home phone \_\_\_\_\_

home fax \_\_\_\_\_

email\* \_\_\_\_\_ \* email required

**Preferred Mailing Address**  Business  Home

**Preferred Email Address**  Business  Home

**Designation**  CPA  CMA  CFA  Other \_\_\_\_\_

**Degree**  Bachelors  Masters  Doctorate  \_\_\_\_\_

Are you a member of any other professional association?

- ACG  AFP  AICPA  CFA Institute (AIMR)  IIA  IMA  Other \_\_\_\_\_

The ethnic and gender data requested below will be used for statistical information and reporting purposes only. It will not be used as part of the membership decision process. Completion of this section is voluntary.

- Male  Female
- Month/Year of Birth \_\_\_\_\_

### What FEI membership benefits interest you most? (Choose all that apply)

- Career Assistance
- Industry News
- Research
- Professional Networking
- Leadership Training
- CPE
- Education
- Other \_\_\_\_\_

### How did you learn about FEI?

- FEI Member (Name \_\_\_\_\_)  Chapter Meeting
- Colleague
- Direct Mail
- E-mail
- Web
- Magazine/Newspaper
- Other \_\_\_\_\_

If elected, I agree that my business and personal conduct shall at all times be entirely consistent with the Code of Ethics of FEI.

\_\_\_\_\_  
*Signature and date*  
 (Please see reverse side for FEI's Code of Ethics. Membership is granted on an individual basis and is non-transferable. Dues are not refundable.)

**payment options**  Check enclosed.  Please charge \$ \_\_\_\_\_ to my  Visa®  MasterCard®  American Express®  Discover®

Card Number: \_\_\_\_\_ Expiration Date \_\_\_\_\_

Card Holder's Name \_\_\_\_\_ Signature \_\_\_\_\_

**YES!** I would like free registration for Summit 2012 (Executive/Associate/In-Transition only). Please register me for this event and confirm via email.

# Qualifications of FEI Membership

**Executive Membership:** The Executive membership category is open to those executives who perform some or all of the duties of a financial executive, as defined by FEI and who serve companies of sufficient size to meet FEI's qualifications. Applicants for Executive membership must meet the specified requirements, and must hold a FEI qualifying title or serve on an audit committee as his/her profession.

## Typical Qualifying Titles:

Chief Financial Officer, Chief Accounting Officer, Controller, Treasurer, Vice President of Finance, Vice President of Planning and Analysis, Vice President of Taxes, Vice President of Pension Fund Investments, Vice President of Risk Management, Director of Finance, Taxes, Treasury, Accounting, Audit Committee member, Senior-Level Specialists

## Qualifying Company Criteria:

- \$5 million in net worth, or
- \$15 million in capital (combined net worth and long-term debt), or
- \$25 million or more in annual revenues.
- \$20 million in operating expenses
- \$500 million in total assets (Financial institutions)
- \$100 million total assets (Government corporations / authorities).

Individuals employed as consultants for service providers typically do not qualify. If an applicant does not hold a typical qualifying title, an applicant may qualify as an Executive member if their duties and responsibilities fall under the following guidelines:

**Assistant Financial Executives** - Assistant Financial Executives must report to the CFO, Vice President – Finance, Controller or Treasurer and perform (on a shared basis) the duties and responsibilities of a financial executive.

**Senior-Level Specialists** - Senior-level Specialists must be the senior policy-making official responsible for Internal Audit, Tax Administration, Planning and Business Development, Risk Management, Management of Retirement Funds and Investments, Management of Investor Relations or Employee Benefits Administration. The Senior-level Specialist's company must have revenues in its most current fiscal year of \$100 million or more, or \$2 billion or more in assets if a financial institution.

## Qualifying Company Criteria

*Assistant Financial Executives/Senior-Level Specialists:*

- Requirement is 4X criterion for financial executives. For example, an assistant controller or assistant treasurer of a company with \$80 million of operating expenses or \$20 million of net worth is eligible. Applicants must be employed by a company with \$100 million in revenues, or \$250 million of employee benefits investments under management, or a financial institution with \$2 billion in assets.

Visit [www.financialexecutives.org/join](http://www.financialexecutives.org/join) for complete eligibility criteria.

**Associate Membership:** Associate members will enjoy all the rights, privileges and services of FEI membership, with the exception of service as a National or Chapter Officer, or service on National Committees. Membership in the Associate category is limited to ten (10) years if during this term the member has not advanced to a position/title that qualifies for membership in the Executive category. Applicants for Associate membership must meet the specified requirements, and must hold a FEI qualifying title

## Typical Qualifying Titles:

Assistant Controller, Assistant Treasurer (from firms with revenues of \$25 million up to \$100 million. At \$100 million or greater, qualify for Executive category of membership).

Senior Manager or Manager:

Accounting, Auditing (General/Internal), Borrowing & Investments, Budget, Cash, Collections, Compliance, Country, Credit, Finance, Corporate Finance, International Finance Project Finance, Trade Finance, Financial Analysis, Financial Planning & Analysis, Financial Reporting, Foreign Exchange, Investor Relations, Planning, Pension & Investment, Risk, Tax, Treasury

## Qualifying Company Criteria:

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- \$25 million or more in annual revenues.
- \$20 million in operating expenses
- \$500 million in total assets (Financial institutions)
- \$100 million total assets (Government corporations / authorities).

## Other Qualifying Criteria:

- Minimum of seven (7) years work experience in the finance profession
- Minimum four (4) year University/College degree (Bachelors); verification required.

**Academic Membership:** Applicants for Academic membership must be a practicing educator in the field of accounting, business or finance and hold academic rank of a Dean, Assistant Dean, Professor, Associate Professor or Assistant Professor.

**In-Transition Membership:** Applicants or membership category transfers for In-Transition membership must be unemployed and must register with Headquarters' Membership Department for Career Management services. Members may remain in the category for two consecutive years at the specified reduced dues rate.

**Government / Military Membership:** This category is open to all senior financial executives who serve in a finance, accounting, budget, or treasury position for a local, state, or federal government agency, department, bureau or office. Applicants for this category should have direct responsibility over budgetary expenditures of at least \$25 million.

**FEI Code of Ethics** - FEI's mission includes significant efforts to promote ethical conduct in the practice of financial management throughout the world. Senior financial officer hold an important and elevated role in corporate governance. While members of the management team, they are uniquely capable and empowered to ensure that all stakeholders' interests are appropriately balanced, protected and preserved. This Code provides principles to which members are expected to adhere and advocate. They embody rules regarding individual and peer responsibilities, as well as responsibilities to employers, the public, and other stakeholders. Violations of FEI's Code of Ethics may subject the member to censure, suspension or expulsion under procedural rules adopted by FEI's Board of Directors.

## All members of FEI will:

- Act with honesty and integrity, avoiding actual or apparent conflicts of interest in personal and professional relationships.
- Provide constituents with information that is accurate, complete, objective, relevant, timely and understandable.
- Comply with applicable rules and regulations of federal, state, provincial, and local governments and other appropriate private and public regulatory agencies.
- Act in good faith, responsibly, with due care, competence and diligence, without misrepresenting material facts or allowing one's independent judgment to be subordinated.
- Respect the confidentiality of information acquired in the course of one's work except when authorized or otherwise legally obligated to disclose. Confidential information acquired in the course of one's work will not be used for personal advantage.
- Share knowledge and maintain skills important and relevant to constituents' needs.
- Proactively promote ethical behavior as a responsible partner among peers, in the work environment and the community.
- Achieve responsible use of and control over all assets and resources employed or entrusted.
- Report known or suspected violations of this Code in accordance with the FEI Rules of Procedure.
- Be accountable for adhering to this Code.