



2008-2009 MEMBERSHIP APPLICATION

You can do this on the web!

http://www.financialplanningforum.org/membership_registration.htm

Questions? Call Karin Swanson at (650) 842-0330.

**Attach your
business card
HERE, if mailing**

1. **REGULAR MEMBERSHIP \$85** **SUSTAINING MEMBERSHIP \$150**

Sustaining membership offers special recognition on the web and the newsletter.

2. Name: _____ Years in Business: _____

3. Please circle the following as your professional designation(s):

CFP, CPA, CLU, ChFC, Other(s): _____

4. Please circle **ONE** of the following as your primary professional category:

- | | | | |
|------------------------|------------------------------|----------------------|------------------------------|
| Accountant | Attorney | Bank /Trust Officer | Charitable Giving Specialist |
| Financial Planner | Insurance | Investment Counselor | Professional Fiduciary |
| Professional Organizer | Real Estate /Mortgage Broker | Securities/Broker | Other: _____ |

5. **Check box if your contact information from last year's website is correct, or make any corrections below.**

Firm: _____

Street/P.O. Box _____

City: _____ State _____ Zip code _____

Bus. Phone () _____ Fax () _____

E-Mail Address: _____

Website Address for Link: _____

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<p>If you are mailing your application send completed form with check and business card to:</p>	<p>Financial Planning Forum, Inc. c/o Karin Swanson, CPA 2600 El Camino Real, Suite 600 Palo Alto, CA 94306</p>
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6. Expanded Statement – For Sustaining Members only.

The directory and the website include a BRIEF personalized statement for **Sustaining** members. Use this opportunity to tell us about your areas of interest or specialty.

Check box if your personal statement from last year's directory is correct.

Your personal statement is limited to **250 character spaces** – NOT words. See the example below.

If you are a new member or want to revise your personal statement, please e-mail your new or revised statement to VRDostal@aol.com. Make your subject heading: FPF Personal Statement for _____
(Fill in your name)

Example: Brad Elman, CLU 408 219-6465 San Jose

22 years specializing in working with closely held businesses for group health, life, long term care, and disability insurance. Representing most major insurers. President of [Nine Dots Benefits and Insurance Services, LLC.](#) CA License numbers 0712077 & 0E50724

**Sustaining members – you may have your photo included on our website.
Please e-mail your photo to ed@biermans.com.**

7. Membership Badge Information

Name: _____ Designation: _____
(As you would like it to appear)

8. Do you want to be listed on the website? Yes or No

If you are mailing your application send completed form with **check and business card** to:

Financial Planning Forum, Inc.
c/o Karin Swanson, CPA
2600 El Camino Real, Suite 600
Palo Alto, CA 94306

Thank you for your continued support of the Financial Planning Forum!