

2022 Membership Application

Return this application to:

MEMBERSHIP

WIFS National Headquarters
136 Everett Rd, Albany, NY 12205

office@wifsnational.org
Fax: 518.935.9232 | Phone: 866.264.9437

RENEW ONLINE AT:

WIFSnational.org/membership

WIFS Membership is rolling and calendar year based. All members renew each year on the day they originally registered. Membership cannot be transferred and is non-refundable.



Membership Information

NAME (FIRST, MI, LAST)

CURRENT EMPLOYER

POSITION/TITLE

PREFERRED EMAIL

WORK ADDRESS

CITY/STATE/ZIP

HOME ADDRESS

CITY/STATE/ZIP

WORK PHONE

CELL PHONE

REFERRED BY

National Membership National Dues \$260

Partner Affiliation Please identify if you're currently affiliated with any of the following*:

- Ameritas Lincoln Financial Mutual of Omaha Reverse Mortgage
- National Life Group Ohio National Financial Services Penn Mutual
- Principal Prudential SPS Family

Chapter Members Members may join one or more chapters, or join as Members at Large without a chapter affiliation. In addition to the chapters listed below, WIFS has several Aspiring Chapters, with more forming throughout the year. Visit wifsnational.org to find an Aspiring Chapter near you.

- Member-at-Large\$0
- Aspiring:**\$25
- AK:** Anchorage\$25
- AZ:** Phoenix\$40
- CA:** Los Angeles\$50
- CA:** Northern California\$50
- CO:** Denver\$50
- FL:** Gold Coast\$50
- FL:** South Florida\$40
- GA:** Atlanta\$50
- KS:** Kansas City\$50
- MI:** Michigan\$50
- MN:** Twin Cities\$50
- MO:** St. Louis\$50
- NE:** Lincoln - Omaha\$50
- NYC & NJ:** New York City/
New Jersey\$75
- OH, IN & KY:** Ohio River Valley\$25
- OR:** Portland\$45
- PA:** Central Pennsylvania\$40
- PA:** Philadelphia Tri-County\$50
- PR:** Puerto Rico\$45
- TX:** Dallas\$50
- TX:** Houston\$40
- WA:** Washington State\$40

Please provide the following demographic information to assist WIFS with strategic planning. Information will remain strictly confidential and be anonymously aggregated in support of corporate partnership and industry promotion initiatives.

Birth Year: _____

- Income: Under \$25K \$250-500K
 \$25-75K \$500-1M
 \$75-125K \$1M+
 \$125-250K

What year did you join the industry? _____

Have you obtained any of the following designations? *Check all that apply.*

- CASL CLTC RHU
- CDFA CLU RICP
- CFP CSA Other: _____
- ChFC FMLI _____
- CLF LUTCF _____

Have you obtained any of the following insurance and securities licenses? Check all that apply.

- Insurance Series 11 Series 66
- Series 6 Series 63
- Series 7 Series 65

Primary Industry Affiliation:

- Accounting/Banking Insurance
- Investments Financial Planning
- Legal Mortgage Other

What best describes your position?

- Attorney Home Manager
- Business Office Producer
- Owner Industry
- CPA Executive

Do you regularly speak on industry topics?

- Yes No

Would you be interested in mentoring another member?

- Yes No

Have you ever served or are you currently serving in the U.S. Military?

- Yes No

Payment Information

Please select one of the following: I would like to pay my dues with a single annual payment
 I would like to pay my annual dues in monthly installments

National Dues \$ _____
Local Chapter Dues \$ _____
Total Dues: (Nat'l & Chapter) \$ _____

I agree to opt in for membership autorenewal and understand that my credit card will be charged the current WIFS dues rate each year on the day auto-renew was originally activated.

Charge to: Visa Master Card American Express Discover

Send Check/Money Order (Payable to WIFS in US Dollars)

CARD NUMBER

EXPIRATION DATE

SECURITY CODE

NAME AS IT APPEARS ON CARD

SIGNATURE

BILLING ADDRESS

CITY

STATE

ZIP

Payments to WIFS are not deductible as charitable contributions for federal income tax purposes. They may be deductible under other provisions of the Internal Revenue Code. No portion of your dues payment is attributable to lobbying expenditures.