FEI BOSTON CHAPTER MEMBERSHIP APPLICATION

Financial Executives International

Member Referral _____ Email_____

Fax completed application to 973.765.1018 or email membership@financialexecutives.org

☐ **Executive** >> **$599**
☐ **Government/Military** >> **$499**
☐ **Academic** >> **$499**
☐ **In-Transition** >> **$299** *(next year's renewal will be $499)*

☐ YES! I want to attend **2019 Current Financial Reporting Insights Conference** (New York, NY) for **$995***. Register me and confirm via email.
☐ YES! I want to attend **2020 Financial Leadership Summit** (Chicago, IL) for **$995***. Register me and confirm via email.
** If you register for CFRI and/or Summit your credit card will be charged upon receipt. If you prefer to pay by check, be sure that the total amount includes your dues and registration event fee.*

Business Information

_____
name

_____
title

_____
company name

_____
company address

_____
city / state / postal code / country

_____
business phone

_____
business fax

_____
business email* **email required*

Preferred Mailing Address ☐ Business ☐ Home
Preferred Email Address ☐ Business ☐ Home

Nature of Entity ☐ public ☐ private ☐ non-profit ☐ other _____

Industry _____

Company Annual Revenue
☐ Less than $10 million ☐ $10 to $24 million ☐ $25 to $49 million
☐ $50 to $99 million ☐ $100 to $499 million ☐ $500 to $999 million
☐ $1 to $5 billion ☐ More than $5 billion

Company Net Worth
☐ Less than $2 million ☐ $2 to $24 million ☐ $25 to $49 million
☐ $50 to $99 million ☐ $100 to $499 million ☐ $500 to $999 million
☐ $1 to $5 billion ☐ More than $5 billion

Personal Information

_____
home address

_____
city / state / postal code / country

_____
home phone

_____
cell phone

_____
email* **email required*

_____
LinkedIn Public Profile URL

Designation ☐ CPA ☐ CMA ☐ CFA ☐ Other _____
Degree ☐ Bachelors ☐ Masters ☐ Doctorate

How did you learn about FEI?
☐ FEI Member ☐ Chapter Meeting ☐ Colleague ☐ Direct Mail ☐ E-mail
☐ Web ☐ Magazine/Newspaper ☐ Other _____

Demographic Information *(optional)*

Gender
☐ Male
☐ Female

Birth date (mm/yy) _____

Ethnicity
☐ African-American ☐ Middle Eastern
☐ Asian ☐ Native American
☐ Caucasian ☐ Pacific Islander
☐ East Indian ☐ Other
☐ Hispanic/Latino _____

Upon join date of membership, I agree that my business and personal conduct shall at all times be entirely consistent with FEI's Code of Ethics.

_____
Signature and date

(FEI's Code of Ethics on reverse side. 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®

Card Number: _____ Expiration Date: _____

Card Holder's Name: _____ Signature: _____

Please note: Your membership may renew at an increased fee.

FEI Membership Qualifications

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, and Audit Committee member*

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

** excludes professionals currently employed by audit firms, consulting firms and service providers*

Qualifying Company Criteria (in USD)

- $2 million in net worth, *or*
- $6 million in capital (combined net worth and long-term debt), *or*
- $10 million or more in annual revenues
- $8 million in operating expenses
- $200 million in total assets (Financial institutions)
- $40 million total assets (Government corporations / authorities)

Earn valuable CPE credits by attending an in-person conference, webinar or online course.

Learn more and register online today!

www.financialexecutives.org/events.aspx

BETTER UNDERSTAND THE VALUE OF FEI MEMBERSHIP FOR YOU AND YOUR COMPANY.

FEI provides premier benefits and services to more than 10,000 best-in-business financial professionals around the globe.

Peer Networking

Share best practices with top senior-level financial executives at national conferences, regional sessions, local Chapter meetings and online events.

"In such a digital world, I enjoy the face-to-face communication—the network of peers is fantastic."
Dana Price, VP, Mergers & Acquisitions, McGraw Hill

Unique, Timely Research and Professional Development

FEI saves you time by delivering insights on emerging issues directly through actionable research and professional updates.

"Exceptional local and national opportunities for networking and training. Connections and a competitive edge."
Carol Zoellner, VP, North America Finance, Hallmark

FEI's Code of Ethics

FEI's mission includes significant efforts to promote ethical conduct in the practice of financial management throughout the world. Senior financial officers 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.

If you are interested in more details about the Academic, In-Transition, or Government/Military membership categories, please contact FEI's Membership Department via email, membership@financialexecutives.org or phone, 877.359.1070.