Three easy ways to apply:

Web—Apply electronically by visiting the IMCA Web site at 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®
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: ________

Membership dues are not refundable and not transferable.

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®
- ☐ CIMC®
- ☐ CPWA®
- ☐ CFA®
- ☐ CFP®
- ☐ 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+

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