

# The Advisors Forum

## INDIVIDUAL MEMBER APPLICATION

Membership Investment Options:

**Option 1** – Initial Membership Investment of \$1,500 \* and monthly dues of \$450 \* per month with a minimum of 12 months membership.

OR

**Option 2** – No Initial Membership Investment, monthly dues of \$495 \* with a minimum of 12 months membership. If you cancel your membership before the end of 36 months, you agree to pay a cancellation fee of \$1500, less \$45 for each month membership dues have been paid.

*\*WealthCounsel members may waive the \$1500 initiation fee and receive a \$100 per month credit on Advisors Forum monthly dues as long as they remain a WealthCounsel member in good standing.*

Monthly dues include Monthly Teleconferences, Newsletters, CE Packages, Knowledge Base, Updates and more.

### REGISTRATION INFORMATION & MAILING ADDRESS:

Primary Member Name \_\_\_\_\_ Nickname \_\_\_\_\_

Broker/Dealer (if applicable) \_\_\_\_\_

Firm Name \_\_\_\_\_

Address Line 1 \_\_\_\_\_ Phone \_\_\_\_\_

Address Line 2 \_\_\_\_\_ Fax \_\_\_\_\_

City, State Zip \_\_\_\_\_

Email \_\_\_\_\_

### REFERRALS:

Name \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

### Additional Information about your Membership

We would like to introduce you as a “featured member” on our website. In order to share your story with your fellow members and others, please contact Member Services at (800) 635-5078, extension 818.

Thank you for joining us. We promise to do our very best for you in every way that we can.

**Jonathan A. Mintz, J.D., Executive Director**

Please complete and **return via fax: 800-842-5105**

Or mail to: The Advisors Forum

PO Box 8568, Bend, OR 97708-8568

E-mail: [info@advisorsforum.com](mailto:info@advisorsforum.com) Phone: (800) 635-5078

# Registration & Automatic Credit/Debit Card Billing Authorization

Upon approval, we will automatically bill your credit/debit card for the amount indicated and your total charges will appear on your monthly credit/debit card statement. You may cancel this automatic billing authorization after your first 12 payments by contacting us at (800) 635-5078 or [accounting@advisorsforum.com](mailto:accounting@advisorsforum.com).

**Member/Customer name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

***\* WealthCounsel Members may waive the \$1500 initiation fee and receive a \$100 per month credit on Advisor Forum monthly dues listed below as long as they remain a WealthCounsel member in good standing.***

## **Option 1 – Initial membership investment plus installment plan for annual membership dues.**

My check for \$1,500\* is enclosed, and I authorize The Advisors Forum to charge my credit/debit card \$450\* each month for the next 12 months for my required annual dues.

**OR**

I authorize The Advisors Forum to charge my credit/debit card \$1,500\* now, for my membership fee and to charge my credit/debit card \$450\* each month for the next 12 months for my required annual dues.

**After completing your first year membership, your membership dues will automatically continue from year to year at then-current membership rate (currently \$450\* per month).**

**OR**

## **Option 2 – Installment plan for annual membership dues – no initial membership investment.**

My check for \$495\* is enclosed, and I authorize The Advisors Forum to charge my credit/debit card \$495\* each month for the next 35 months (for a total of 36 monthly payments) for my required annual dues.

**OR**

I authorize The Advisors Forum to charge my credit/debit card \$495\* now, and I authorize The Advisors Forum to charge my credit/debit card \$495\* each month for the next 35 months (for a total of 36 monthly payments) for my required dues.

**If I cancel my membership before 36 months I agree to pay The Advisors Forum a cancellation fee of \$1500, less \$45 for each month membership dues have been paid.**

**After 36 months your membership dues will automatically continue from year to year at the membership rate of \$495\* per month.**

**Total Amount to Charge my Card Today \$ \_\_\_\_\_**

**Card type:**  MasterCard  VISA  AMEX  Discover

\_\_\_\_\_  
Credit card number

\_\_\_\_\_  
Expires

\_\_\_\_\_  
3-4 Digit Code (required)

\_\_\_\_\_  
Cardholder's name  
(as shown on credit card)

\_\_\_\_\_  
Cardholder's Zip code (required)  
(from credit card billing address)

\_\_\_\_\_  
Cardholder's Signature

\_\_\_\_\_  
Date

**NOTES:** \_\_\_\_\_

# Agreement & Policies

**Please read and sign below to accept this agreement as part of your membership application.**

## **Site License**

Wealth Strategies Inventory™ is sold as a site license for a one-time member initiation fee and monthly maintenance and support dues renewable on an annual basis. A site license is comprised of one firm at one office location.

Initial memberships must commit to one year or 12 monthly payments. Separate satellite office(s) will incur additional monthly dues but are not required to pay separate membership initiation fees. A home office computer or laptop computer for the same firm are not considered separate satellite office(s) and additional monthly dues are not required.

All other Advisors Forum products and services are provided for the individual member's use only (or use with a co-presenter in the case of the Advisors Forum Presents™ Continuing Education Packages) and not via site license, unless expressly provided otherwise; e.g., monthly teleconferences and newsletters.

## **Maintenance & Support Dues**

The maintenance and support dues include unlimited software support by toll free telephone or email. Dues also include access to The Advisors Forum's Knowledge Base, an online file storage area containing numerous helpful resources for alternative PowerPoint presentations, letters, etc. Subscription includes all regular updates.

## **30-Day Refund Guarantee**

The Advisors Forum provides a 30-day refund policy to new members. Should a new member decide to return all Advisors Forum products within 30 days, The Advisors Forum will fully refund the initial membership fee and any monthly fees paid before the return, plus any obligation for future monthly payments will be cancelled. This is conditioned on a return of all Advisors Forum software and the acknowledgment of The Advisors Forum Copyright for which all rights are reserved and no part may be reproduced or used in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information or retrieval system.

## **90 Day Temporary Suspension for Initiation Fees**

Should a member require a temporary suspension of membership and monthly dues for any reason, The Advisors Forum will grant that request and will not require an additional membership initiation fee when the member resumes membership within 90 days or after no more than 3 monthly payments are skipped. After 90 days or if 4 or more monthly payments are missed, a member may resume membership upon agreement to pay the then-current membership fees.

Accepted \_\_\_\_\_

Date \_\_\_\_\_

Print name \_\_\_\_\_

State where licensed \_\_\_\_\_

License number \_\_\_\_\_