

## *APPLICATION for MEMBERSHIP*

### SECTION 1 – PERSONAL DETAILS:

<b>Surname:</b>		<b>Mr / Mrs / Ms / Miss</b>
<b>Given Names:</b>		<b>DOB:</b>
<b>Mailing Address:</b>  (Please tick appropriate box to identify whether this is a "Business" or "Private" address.)	<hr/> <hr/> <hr/> <div style="display: flex; justify-content: space-between;"> <span>State: _____</span> <span>Postcode: _____</span> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <input type="checkbox"/> Business address         <input type="checkbox"/> Private address       </div>	
<b>Employer:</b>		
<b>Current Position:</b>		
<b>Branch/Department:</b>		
<b>Business Address:</b>	<hr/> <hr/> <hr/> <div style="display: flex; justify-content: space-between;"> <span>State: _____</span> <span>Postcode: _____</span> </div>	
<b>Home Address:</b>	<hr/> <hr/> <hr/> <div style="display: flex; justify-content: space-between;"> <span>State: _____</span> <span>Postcode: _____</span> </div>	
<b>Business Numbers:</b>	Tel: (    ) Fax: (    ) Email:	
<b>Private Numbers:</b>	Tel: (    ) Mobile: Email:	

**SECTION 2 – EDUCATIONAL QUALIFICATIONS:** (Please attach copies of academic results / transcripts)

- |  |   |
|--|---|
| <input type="checkbox"/> Year 10 or equivalent                           | <input type="checkbox"/> Diploma / Certificate                    |
| <input type="checkbox"/> Year 12 or equivalent                           | <input type="checkbox"/> Degree                                   |
| <input type="checkbox"/> <i>IFS</i> Certificate IV in Financial Services | <input type="checkbox"/> <i>IFS</i> Diploma in Financial Services |

Qualification Awarded: \_\_\_\_\_ Year: \_\_\_\_\_

Educational Institution: \_\_\_\_\_

**SECTION 3 – FINANCE INDUSTRY EXPERIENCE:** (If insufficient space please attach details.)

Name of Organisation	Position	Years of Service

**SECTION 4 – APPLICATION FOR MEMBERSHIP:**

To the Council of the Institute of Financial Services Inc. -

*"I apply for IFS membership in the grade to which, in the judgement of the Divisional Council, I am entitled. If admitted, I agree to be bound by the rules, objects, by-laws, code of ethics and any amendments or additions thereto, during the period of my membership." Also enclosed is ONE business and ONE personal reference.*

**NB:** Business and personal references **ARE NOT REQUIRED** for applicants who have completed any *IFS* course.

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**SECTION 5 – FEES:**

- I enclose \$ \_\_\_\_\_ for my Membership Fee for the 20 \_\_\_\_ calendar year. **OR**  
 I wish to pay by Visa or Mastercard. Please contact me by telephone for details.  
(See fee schedule below which *includes GST*.)

**Qualifications Necessary for Admittance to each Grade**

<i>Grade</i>	<i>Qualifications and Work Experience</i>	<i>Designation</i>	<i>Fee</i>
<b>FELLOW</b>	Relevant qualifications for the financial services industry and employed in a Senior Position in the industry.	<b>FIFS</b>	<b>\$99</b>
<b>ASSOCIATE</b>	(i) Executive position for 1 year plus academic qualifications; or considerable work experience <b>or</b> completion of either <i>IFS</i> Certificate IV or Diploma in Financial Services course; <b>OR</b> (ii) Occupation in finance industry for 2 years plus other qualifications.	<b>AIFS</b>	<b>\$77</b>
<b>MEMBER</b>	Occupation in the finance industry.		<b>\$55</b>
<b>CORPORATE</b>	Any organisation directly associated with the finance industry.		<b>\$300</b>