



Leaders in banking.

# FWI Membership Application

Please complete both sides of this application.

## PERSONAL INFORMATION

Name: \_\_\_\_\_ Member # (for renewals only): \_\_\_\_\_  
 Title: \_\_\_\_\_ Company: \_\_\_\_\_  
 Work Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State/Prov: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Work Phone: \_\_\_\_\_ Work Fax: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State/Prov: \_\_\_\_\_ Zip: \_\_\_\_\_

## ACTIVE/ALLIED MEMBERSHIP DUES

Membership Year: 9/1 - 8/31; \$199/year (pro-rated based on membership start date)  
 Member Type:  **New Member**  Active Professional Membership: \$199  
 **Renewal** (note mbr# above)  Retired (retired before 9/1/05): \$79  
 Amount Due (see pro-rated dues reference): \$ \_\_\_\_\_  
 FWI Foundation contribution: \$ 25.00 (Voluntary tax-deductible contribution under section 501(c)(3) of the IRS code.)  
 Total Payment (U.S. dollars only): \$ \_\_\_\_\_

PRO-RATED DUES REFERENCE	
9/1-9/30	\$199.00
10/1-10/31	\$182.40
11/1-11/31	\$165.80
12/1-12/31	\$149.25
1/1-1/31	\$132.65
2/1-2/28	\$116.10
3/1-3/31	\$ 99.50
4/1-4/30	\$ 82.95
5/1-5/31	\$ 66.35
6/1-6/30	\$ 49.75
7/1-7/31	\$ 33.20
8/1-8/31	\$ 16.60

## PAYMENT INFORMATION

Join Online - please visit [www.fwi.org](http://www.fwi.org)  
 Check Enclosed Payable to: FWI, 1027 W. Roselawn Ave., Roseville, MN 55113  
 Credit Card - can be faxed toll-free to: 866-807-6081  
 Charge to my:  Visa  MasterCard  American Express  Discover  
 Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
 Cardholder's Name: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## LOCAL GROUP AFFILIATION AND SPONSOR INFORMATION

How did you hear about FWI? \_\_\_\_\_  
 Name/mbr# of FWI member (if referred): \_\_\_\_\_  
 Send information about a group in my area.  Joining Group # \_\_\_\_\_

FWI dues are not deductible as a charitable contribution for federal tax purposes but are deductible as any ordinary business expense. Donations to the FWI Foundation are deductible as charitable contributions under section 501(c)(3) of the IRS code.

## DEMOGRAPHIC INFORMATION

Please complete the section below. All information is completely voluntary. Some information is included in the online member directory for professional networking purposes.

**Date Of Birth – confidential:** \_\_\_/\_\_\_/\_\_\_

**Highest Level of Education – confidential:**  
(circle one)

- |                  |                        |
|------------------|------------------------|
| 1 High School    | 4 Technical Degree     |
| 2 Some College   | 5 Some Post-Graduate   |
| 3 College Degree | 6 Post-Graduate Degree |
| 7 Other: _____   |                        |

**Primary Responsibility:** (circle one)

- 1 Administration/Support
- 2 Entry-Level Professional
- 3 Supervisory
- 4 Middle Management
- 5 Senior Management

**Employment Status:** (circle one)

- |             |                 |
|-------------|-----------------|
| 1 Part-Time | 4 Self-Employed |
| 2 Full-Time | 5 Retired       |
| 3 Flex-Time | 6 Student       |

**Work Setting:** (circle one)

- 02 Association
- 24 CPA Firm
- 01 Commercial Bank
- 13 Credit Union
- 19 Data Processing Service Bureau
- 17 Finance Company
- 04 Government
- 08 Industry Consulting Practice
- 26 Industry Vendor
- 11 Insurance Company
- 47 Law Office
- 15 Mortgage Bank/Loan Company
- 25 Regulatory Agency
- 07 Savings & Loan/Savings Bank
- 05 Self-Employed: \_\_\_\_\_
- 10 Securities Company
- 20 Title Company
- 03 Trust Company
- 99 Other: \_\_\_\_\_

**Salary – confidential:** (circle one)

- |                      |                     |
|----------------------|---------------------|
| 1 < \$50,000         | 2 \$50,000–\$75,000 |
| 3 \$75,001–\$100,000 | 4 > \$100,000       |

**Years In The Financial Services Industry:**

- (circle one)
- |             |               |
|-------------|---------------|
| 1 0-5 yrs   | 4 16-20 yrs   |
| 2 6-10 yrs  | 5 Over 20 yrs |
| 3 11-15 yrs | 6 N/A         |

**Please circle up to three areas of expertise for our online directory:**

- |                                     |                                       |
|-------------------------------------|---------------------------------------|
| 01 Accountant/CPA                   | 54 Lending-Consumer (Indirect)        |
| 02 Auditing                         | 55 Lending-Credit Administration      |
| 03 Branch Administration            | 56 Lending-Credit Analysis            |
| 04 Branch Management                | 57 Lending-Factoring                  |
| 05 Branch Management-Teller Op      | 58 Lending-Operations/Loan Review     |
| 06 Cash Management                  | 59 Lending-Private Banking            |
| 07 Chief Executive Officer          | 60 Lending-Residential Construction   |
| 08 Chief Financial Officer          | 61 Lending-Residential Real Estate    |
| 09 Communications-General           | 62 Lending-Workout/Recov/Collect      |
| 10 Communications-In-House Pub      | 63 Marketing-General                  |
| 11 Communications-Public Relations  | 64 Marketing-Advertising              |
| 12 Compliance                       | 65 Marketing-Business Development     |
| 13 Comptroller                      | 66 Marketing-Market Research          |
| 14 Comptroller-Accounting           | 67 Marketing-Product Development      |
| 15 Comptroller-Financial Reporting  | 68 Marketing-Mortgage Services        |
| 16 Comptroller-General Ledger/Op    | 69 Mortgage Services-Administration   |
| 17 Comptroller-Taxes                | 70 Mortgage Services-Appraisal        |
| 18 Corporate Finance/Analysis       | 71 Mortgage Services-Commercial       |
| 19 Corporate Strategic Planning     | 72 Mortgage Services-Operations       |
| 20 Correspondent Banking            | 73 Mortgage Services-Residential      |
| 21 Data Processing/Info Services    | 74 Operations-General                 |
| 22 Economics-General                | 75 Operations-Bookkeeping             |
| 23 Economics-Research               | 76 Operations-Cash Management         |
| 24 Economics-Forecasting            | 77 Operations-Demand DepAcctg         |
| 25 General Services-General         | 78 Operations-Electronic Banking      |
| 26 General Services- Cashier        | 79 Operations-Mortgage Services       |
| 27 General Services-Property Mgmt   | 80 Operations-Proof/Transit           |
| 28 General Services-Security        | 81 Operations-Retirement              |
| 29 Government Banking               | 82 Operations-Savings                 |
| 30 Human Resources-General          | 83 Operations-Telecommunications      |
| 31 Human Resources-Benefits Admin   | 84 Professional Services              |
| 32 Human Resources-Employ Comp      | 85 Retail Banking-General             |
| 33 Human Resources-EEO Compl        | 86 Retail Banking-ATMs                |
| 34 Human Resources-Personnel Admin  | 87 Retail Banking-Bank Card-Issuer    |
| 35 Human Resources-Recruiting       | 88 Retail Banking-Bank Card-Merchant  |
| 36 HR-Training/Prof Dev             | 89 Retail Banking-Customer Svc        |
| 37 Independent Consultant           | 90 Retail Banking-Personal Banking    |
| 38 Insurance Services               | 91 Retail Banking-Per Lines of Credit |
| 39 International Banking            | 92 Retail Banking-Safe Deposits       |
| 40 Investments-General              | 93 Retail Banking-Supermkt Banking    |
| 41 Investments-Asset/Liability Mgmt | 94 Sales                              |
| 42 Investments-Brokerage Services   | 95 Trust-General                      |
| 43 Investments-Financial Planning   | 96 Trust-Administration               |
| 44 Investments-Funds Management     | 97 Trust-Investment                   |
| 45 Investments-Trading Desk         | 98 Trust-Marketing                    |
| 46 Leasing/Sales Finance            | 99 Trust-Operations                   |
| 47 Legal Counsel                    |                                       |
| 48 Legal Relations                  |                                       |
| 49 Lending-General                  |                                       |
| 50 Lending-Agricultural             |                                       |
| 51 Lending-Commercial               |                                       |
| 52 Lending-Com Real Estate          |                                       |
| 53 Lending-Consumer (Direct)        |                                       |