

## MEMBERSHIP APPLICATION

### 1 GENERAL INFORMATION (Please type or print)

This application is for membership in the Association for Financial Professionals of Canada. Membership dues are individual, non-refundable and non-transferable. All memberships expire December 31 of the year they begin. New members joining after March 31 will receive credit toward their following year's dues.

Prior to submitting this application, please read the "Protection of Personal Information" on reverse.

Mr.     Ms.     Mrs.     Dr.

Member's Full Name: \_\_\_\_\_  
First Middle Initial  
 \_\_\_\_\_  
Last Suffix

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Home     Business

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City: \_\_\_\_\_ Province/State: \_\_\_\_\_

Postal/Zip Code: \_\_\_\_\_ Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

#### ATTN: Senior Treasurers

If you are a senior treasurer or an employee with senior treasury or finance responsibilities (for a company with revenues in excess of CAD \$100 million) in Canada, check here to learn about the benefits of membership in *The Society of Canadian Treasurers*.

### 2 METHOD OF PAYMENT

Annual Membership Dues: CAD \$414.75 (\$395 + 5% GST)

GST# 86327 4908 RT0001

Cheques should be made payable to the Association for Financial Professionals of Canada.

Cheque Enclosed

American Express     MasterCard     Visa     Discover Card     Diners Club

Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

### 3 THREE EASY WAYS TO APPLY

1. Mail application along with payment to:  
AFP of Canada, P.O. Box 7427, Postal Station A, Toronto, Ontario M5W 3C1
2. Fax to AFP of Canada: 416.595.5032 *(credit card payments only)*
3. Apply online at [www.AFPonline.ca/join](http://www.AFPonline.ca/join)

#### KAA9 FOR OFFICE USE ONLY

ID#: \_\_\_\_\_ CC/CK# \_\_\_\_\_

LB Date: \_\_\_\_\_ Amt. :\$ \_\_\_\_\_

Perm: \_\_\_\_\_

### 4 TELL US ABOUT YOURSELF

#### 1. Your relationship to finance: *(Check one)*

- CP  I direct finance and/or treasury functions for my organization.  
 AS  I sell/manage products/services to financial organizations, or I perform services/consulting for financial clients.  
 AC  I am a full-time instructor in finance at an accredited post-secondary educational institution.

#### 2. Your organization's industry: *(Check one)*

- |   |   |
|---|---|
| AC <input type="checkbox"/> Academic                  | IN <input type="checkbox"/> Insurance       |
| BF <input type="checkbox"/> Banking                   | MN <input type="checkbox"/> Manufacturing   |
| BS <input type="checkbox"/> Business Svcs./Consulting | NP <input type="checkbox"/> Non-profit      |
| CM <input type="checkbox"/> Comm./Media               | PE <input type="checkbox"/> Petroleum       |
| CX <input type="checkbox"/> Const./Const. Supply      | RE <input type="checkbox"/> Real Estate     |
| EN <input type="checkbox"/> Energy/Non-petroleum      | RT <input type="checkbox"/> Retail          |
| FS <input type="checkbox"/> Financial Services        | SW <input type="checkbox"/> Software        |
| GV <input type="checkbox"/> Government                | TC <input type="checkbox"/> Technology      |
| HS <input type="checkbox"/> Health Services           | TR <input type="checkbox"/> Transportation  |
| HT <input type="checkbox"/> Hospitality/Travel        | UT <input type="checkbox"/> Utility         |
| OT <input type="checkbox"/> Other (Specify)           | WD <input type="checkbox"/> Wholesale/Dist. |

#### 3. Your organization's classification: *(Check one)*

- PUB  Publicly traded    COL  College/University  
 PRI  Privately/Closely held    NON  Non-profit entity  
 GOV  Government entity

#### 4. How does your organization measure performance? *(Check one)*

- (1)  Sales    (2)  Assets

#### 5. Your organization's annual sales/assets: *(Check one)*

- |  |  |
|--|--|
| (1) <input type="checkbox"/> Under \$50 million  | (6) <input type="checkbox"/> \$1-4.9 Billion   |
| (2) <input type="checkbox"/> \$50-99.9 million   | (7) <input type="checkbox"/> \$5-9.9 Billion   |
| (3) <input type="checkbox"/> \$100-249.9 million | (8) <input type="checkbox"/> \$10-20 Billion   |
| (4) <input type="checkbox"/> \$250-499.9 million | (9) <input type="checkbox"/> Over \$20 Billion |
| (5) <input type="checkbox"/> \$500-999.9 million |  |

#### 6. Your five primary work responsibilities:

*(Rank 1-5, where 1 means "most frequently performed")*

- (18) \_\_\_\_\_ Accounting/Financial Reporting
- (2) \_\_\_\_\_ Bank/Relationship Mgmt.
- (3) \_\_\_\_\_ Borrowing-short term
- (23) \_\_\_\_\_ Borrowing-long term
- (5) \_\_\_\_\_ Corporate Finance
- (24) \_\_\_\_\_ Credit Management/Collections
- (17) \_\_\_\_\_ EDI/FEDI/EC
- (6) \_\_\_\_\_ Education-Finance/Treasury
- (20) \_\_\_\_\_ Financial Planning
- (7) \_\_\_\_\_ Financial Risk Mgmt./Hedging
- (21) \_\_\_\_\_ Insurance Risk Management
- (27) \_\_\_\_\_ International Cash Mgmt.
- (8) \_\_\_\_\_ International Treasury Mgmt.
- (19) \_\_\_\_\_ Investing-short term
- (25) \_\_\_\_\_ Investing-long term
- (10) \_\_\_\_\_ Payments (Accounts Payable) Mgmt.
- (26) \_\_\_\_\_ Pension and/or Employee Benefits Mgmt.
- (11) \_\_\_\_\_ Prod./Svc. Sales-Bank/Financial Svcs.
- (12) \_\_\_\_\_ Prod./Svc. Sales-Hardware/Software
- (13) \_\_\_\_\_ Professional Consulting
- (1) \_\_\_\_\_ Receivables (Accounts Receivable) Mgmt.
- (4) \_\_\_\_\_ Treasury Mgmt. Product Dev.
- (15) \_\_\_\_\_ U.S. Cash Management
- (99) \_\_\_\_\_ Other (Specify) \_\_\_\_\_

#### 7. Please indicate the professional credentials you have earned: *(excluding college degrees)*

- CTP or CCM     CFA     Other-Specify \_\_\_\_\_  
 CPA     CA

#### 8. Year you entered the financial profession: \_\_\_\_\_

**PROTECTION OF PERSONAL INFORMATION**

*Personal information collected in this Membership Application is used by the Association for Financial Professionals of Canada ("AFP Canada") to process your application and for the purposes of fulfilling AFP Canada's mandate of representing and promoting the interests of treasury and financial professionals in Canada and for the provision of education, training and professional development services and products, and other products and services and information by AFP Canada or other organizations selected to do so by AFP Canada. We may disclose this information to our employees, volunteers, service providers and authorized representatives who need it for functions relevant for these purposes, and as required or permitted by law. This will be done in a manner consistent with the AFP Canada Privacy Policy, which is available for review at [www.AFPonline.ca/privacy](http://www.AFPonline.ca/privacy)*

*AFP Canada offers its products and services to you in affiliation with the Association for Financial Professionals, Inc. (AFP USA) of Bethesda, Maryland. Most of AFP Canada's administrative functions are performed on its behalf by AFP USA, and accordingly, your personal information will be transferred to AFP USA for these purposes. This information is also shared with AFP USA to allow them to offer to you their products and services as well as those of selected third parties.*

*By submitting this Membership Application, you consent to the collection, use and limited disclosure of your personal information for the purposes and in the manner described.*

*You may withdraw at any time your consent to the disclosure by AFP Canada of your personal information to any organization other than AFP USA seeking to provide services, products or information to AFP Canada members, or to the disclosure of your personal information by the publication of that information in the print or online version of our Membership Directory, by e-mailing us at [AFPC@AFPonline.ca](mailto:AFPC@AFPonline.ca).*