



PAICR Membership Guidelines

Individual Membership Description

PAICR Individual Membership is open to those professionals who work within the support resources areas in the investment management industry in one of the following job functions:

- Administration
- Advertising
- Client Communications
- Compliance
- Database Questionnaires
- Investment and Marketing Technology
- Market Research/Analysis
- Support
- Operations
- Performance Measurement/Analysis
- Product Development
- Production and Design
- Public Relations
- Requests for Proposal Writing
- Training
- Website Development

Communications Consultants are now eligible for individual membership in PAICR!

Attention Communication Consultants:
Your PAICR membership now includes access to the same educational opportunities offered to other individual members.

In order to preserve the privacy of PAICR members, Communications Consultants will not have access to the contact information of fellow members.

Statement of Eligibility

I hereby certify that I have read the PAICR Membership Guidelines and I qualify for Individual Membership status.

Signature _____ Date _____

Membership Application/Profile

Name _____
 Company _____
 Title or Position _____
 Address _____
 City/State/Postal Code _____
 Phone/Fax _____
 E-mail Address _____
 Web Site Address _____
 Degrees Earned _____
 College/University _____
 Years in Current Position _____
 Referred By _____

PAICR Individual Membership is open to those professionals who work in the support resources areas in the investment management industry. Please check your personal area(s) of focus below.

- | | | |
|--|--|--|
| <input type="checkbox"/> Client communications | <input type="checkbox"/> Website development | <input type="checkbox"/> Production and design |
| <input type="checkbox"/> Public relations | <input type="checkbox"/> Marketing research/analysis | <input type="checkbox"/> Marketing assistance |
| <input type="checkbox"/> Compliance | <input type="checkbox"/> Operations | <input type="checkbox"/> Advertising |
| <input type="checkbox"/> Investment/marketing tech | <input type="checkbox"/> Requests for proposals | <input type="checkbox"/> Product development |
| <input type="checkbox"/> Database management | <input type="checkbox"/> Training | <input type="checkbox"/> Administration |
| | <input type="checkbox"/> Writing | <input type="checkbox"/> _____ |

Please check your firm type and area(s) of focus below.

- | | | |
|---|--|---|
| Investment Firm | Consultants | Marketing Services |
| <input type="checkbox"/> Defined Benefit | <input type="checkbox"/> Investment/Search | <input type="checkbox"/> RFP Service Provider |
| <input type="checkbox"/> Defined Contribution | <input type="checkbox"/> Marketing | <input type="checkbox"/> Writer |
| <input type="checkbox"/> Managed Accounts/ Wrap | <input type="checkbox"/> E-Consulting | <input type="checkbox"/> Designer |
| <input type="checkbox"/> Retail/Mutual Funds | <input type="checkbox"/> Communications | <input type="checkbox"/> PR/Advertising |
| <input type="checkbox"/> High Net Worth | | |
| <input type="checkbox"/> Family Offices | | |

I would like to sign up as a Mentor Mentee Neither

Annual Dues

Fees are in U.S. dollars and are for a calendar year period of January 1 to December 31.

- \$250 USD Individual Membership (one year)
- \$50 Processing fee for new members and members whose renewal is more than 3 months expired

Notice to those who join mid-year:

A second year prorating policy has been put into effect so that all members are on the same calendar year dues schedule. When a new member joins PAICR, that person will pay for a full year's dues. Then the member will receive a renewal notice in January of the following year. That invoice will be prorated for the number of months remaining following the month of his/her joining. In subsequent years the member will be invoiced in full in January. Any new members joining PAICR between October and December, are carried into the next year without having any additional dues to pay.

Instructions:

- Return fully-completed application
- Include payment

- Enclosed is my check payable to PAICR.
 MasterCard Visa American Express Discover

Account # _____ Exp. Date _____
 Signature _____ Cardholder Name _____

If you have any questions, please contact PAICR Headquarters at 866-993-0999 or via email at paicr@cmasolutions.com.

**Fax application to 1-609-799-7032 or mail to PAICR at
 191 Clarksville Road, Princeton Junction, New Jersey 08550 USA**