



Boutique Financial Planning Principals Association Inc.

# APPLICATION FOR MEMBERSHIP

Name of Member:  FAAA Member No:

*Name of Business Principal (or controlling individual) who is a Practitioner Member of FAAA*

Name of AFS Licensee:

Business Name: (if different):

Business Address:

State:  PCode:  Ph (Bus):  Mobile:

Email:  Website:

AFSL No:  Date issued:  External compliance consultant:

Class of Membership:  Principal  Associate  Affiliate  Retired

(For Associate Member Applications) Estimated date of your AFSL:

Total number of staff employed:  Total number of staff on FAR:

How many staff hold membership with the following associations?

Financial Advice Association Australia:  Self-Managed Super Fund Association:  Tax Practitioners Board:

Please list other associations you belong to:

How did you discover the BFP?:

## MEMBER DECLARATION:

FAAA members are required to notify the FAAA in writing within 7 days of the occurrence of any "notifiable events". Please read Schedule 4 of the FAAA Member Regulation and confirm you have read this:  Yes  No

If any of the events listed have occurred within the last 12 months, please provide details below and confirm you notified the FAAA as required  N/A  Yes  No

Are any FAAA members in your business currently the subject of an investigation by the FAAA Conduct Review Commission and if Yes provide details below  Yes  No

(If insufficient space, provide an annexure to the application)



**Boutique Financial Planning Principals Association Inc.**

**ANNUAL MEMBERSHIP FEES:**

Membership fees cover the period 1 July to 30 June. Payment for the first year is pro-rated for the period from approval of the application to 30 June, with an invoice for that amount provided to you when you are notified of a successful application. See website for more information.

**TERMS:**

By submitting this application you agree to the following terms:

- You agree to abide by the rules of the BFP (Boutique Financial Planning Principals Association Inc.) as set out in the Constitution.
- You agree to uphold the values, mission and aims of the BFP.
- You agree that if any information on this Application form is found to be incorrect, that the Application may be deemed invalid and Membership granted as a result of this Application may be forfeited.
- You will not purport to represent the BFP in the media or other public forum, unless specifically authorized by the Executive.
- You agree to not disclose any information of a sensitive commercial nature relating to the BFP, BFP Members or Member Benefits and Discounts.

Applicant Name:

Applicant Signature:  Date:

As per the Constitution, new members must be proposed by one BFP member and seconded by another member.

Proposer Name:

Proposer Signature:  Mobile:

Secunder Name:

Secunder Signature:  Mobile:

**PRIVACY STATEMENT**

The BFP respects your privacy. Any information you give us or is collected by us, will be kept confidential and held with the utmost care, and will not be sold, rented, loaned, or otherwise disclosed and will not be used in ways that you have not consented to. A Members Register is maintained and is open for inspection by Members on request. Member's business name and a link to their website are published on the public pages of the BFP website.

**ADMINISTRATION USE**

Date Application received

Date Rejected or Approved

Date Applicant Notified

Date Subscription Received