

Member Referral _____ Email _____

Fax completed application to 973.765.1018 or email membership@financialexecutives.org

- | | |
|--|--|
| <input type="checkbox"/> Executive >> \$649 | <input type="checkbox"/> Academic >> \$649 |
| <input type="checkbox"/> Government/Military >> \$649 | <input type="checkbox"/> In-Transition >> \$649 |

- YES! I want to attend **2020 Financial Leadership Summit***. Register me **COMPLIMENTARY** and confirm via email.
- YES! I want to attend **2020 Corporate Financial Reporting Insights Conference***. Register me **COMPLIMENTARY** and confirm via email.

* If you register for an event that charges as fee your credit card will be charged upon receipt. If you prefer to pay by check, be sure that the total amount includes your dues and registration fees.

Business Information

Personal Information

name _____

title _____

company name _____

company address _____

city / state / postal code / country _____

business phone _____

business fax _____

business email* _____ *email required

home address _____

city / state / postal code / country _____

home phone _____

cell phone _____

alternate email* _____ *email required

LinkedIn Public Profile URL _____

- Designation** CPA CMA CFA Other _____
- Degree** Bachelors Masters Doctorate

How did you learn about FEI?

- FEI Member Chapter Meeting Colleague Direct Mail E-mail
- Web Trade Publication Other _____

Demographic Information (optional)

- | | |
|---------------------------------|---|
| <u>Gender</u> | <u>Ethnicity</u> |
| <input type="checkbox"/> Male | <input type="checkbox"/> African American <input type="checkbox"/> Middle Eastern |
| <input type="checkbox"/> Female | <input type="checkbox"/> Asian <input type="checkbox"/> Native American |
| | <input type="checkbox"/> Caucasian <input type="checkbox"/> Pacific Islander |
| | <input type="checkbox"/> East Indian <input type="checkbox"/> Other |
| | <input type="checkbox"/> Hispanic/Latino _____ |

Birth date (mm/yy) _____

- Preferred Mailing Address** Business Home
- Preferred Email Address** Business Home
- Nature of Entity** public private non-profit other _____
- Industry** _____

Company Annual Revenue

- | | | |
|---|---|---|
| <input type="checkbox"/> Less than \$10 million | <input type="checkbox"/> \$10 to \$24 million | <input type="checkbox"/> \$25 to \$49 million |
| <input type="checkbox"/> \$50 to \$99 million | <input type="checkbox"/> \$100 to \$499 million | <input type="checkbox"/> \$500 to \$999 million |
| <input type="checkbox"/> \$1 to \$5 billion | <input type="checkbox"/> More than \$5 billion | |

Company Net Worth

- | | | |
|--|---|---|
| <input type="checkbox"/> Less than \$2 million | <input type="checkbox"/> \$2 to \$24 million | <input type="checkbox"/> \$25 to \$49 million |
| <input type="checkbox"/> \$50 to \$99 million | <input type="checkbox"/> \$100 to \$499 million | <input type="checkbox"/> \$500 to \$999 million |
| <input type="checkbox"/> \$1 to \$5 billion | <input type="checkbox"/> More than \$5 billion | |

Upon join date of membership, I agree that my business and personal conduct shall at all times be entirely consistent with FEI's Code of Ethics.

Signature and date _____

(FEI's Code of Ethics on reverse side. Membership is granted on an individual basis and is non-transferable. Dues are not refundable.)

payment options

- Check enclosed Please charge \$_____ to my: Visa® MasterCard® American Express® Discover Card®

Card Number: _____ Expiration Date: _____

Card Holder's Name: _____ Signature: _____

Please note: Your membership may renew at an increased fee.

FEI Membership Qualifications

Executive Membership

The Executive membership category is open to those executives who perform some or all the duties of a financial executive, as defined by FEI and who serve companies of sufficient size to meet FEI's qualifications. Applicants for Executive membership must meet the specified requirements and must hold a FEI qualifying title or serve on an audit committee as his/her profession. In all cases, qualifying members perform their duties on behalf of their organization as an internal resource and not in a client or customer facing role. Persons whose job duties involve business development, client services, sales, marketing or other client-facing responsibilities do not qualify for membership, irrespective of their job title.

Typical Qualifying Titles

Chief Financial Officer, Chief Accounting Officer, Controller, Treasurer, Vice President of Finance, Vice President of Planning and Analysis, Vice President of Taxes, Vice President of Pension Fund Investments, Vice President of Risk Management, Director of Finance, Taxes, Treasury and Accounting. Audit Committee members also qualify for membership, providing they are not currently employed by audit firms, consulting firms, and service providers.

Senior Manager or Manager: Accounting, Auditing (General/Internal), Borrowing & Investments, Budget, Cash, Collections, Compliance, Country, Credit, Finance, Corporate Finance, International Finance, Project Finance, Trade Finance, Financial Analysis, Financial Planning & Analysis, Financial Reporting, Foreign Exchange, Investor Relations, Planning, Pension & Investment, Risk, Tax, Treasury.

Qualifying Company Criteria (in USD)

- \$2 million in net worth, or
- \$6 million in capital (combined net worth and long-term debt), or
- \$10 million or more in annual revenues
- \$8 million in operating expenses
- \$200 million in total assets (Financial institutions)
- \$40 million total assets (Government corporations / authorities)

Earn valuable CPE credits by attending a conference, webinar, professional development course, or on demand course.

Learn more and register online today!

www.financialexecutives.org/events

BETTER UNDERSTAND THE VALUE OF FEI MEMBERSHIP FOR YOU AND YOUR COMPANY.

FEI provides premier education, networking, research and other services to 10,000 best-in-business financial professionals around the globe.

"FEI has helped me to further my career by providing connections to top finance leaders in a variety of industries both locally and nationally. The ideas and insights that I received helped me get to the top of my profession."

Paul Hensley | SVP, Finance, CFO & Treasurer | HOLT CAT

"I believe the research produced by FEI's research foundation makes me a more knowledgeable executive, especially the annual Compensation and Audit Fee reports."

Marie Gallagher | SVP and Controller | PepsiCo

"The FEI national committees where firms, companies and the FASB align and even alter new standards, plus the connections I have made with many companies with similar interests have been invaluable to me and our company."

Shawn Husband | Sr. Director, Global Lease Center Expertise | Walmart

FEI's Code of Ethics

FEI's mission includes significant efforts to promote ethical conduct in the practice of financial management throughout the world. Senior financial officers hold an important and elevated role in corporate governance. While members of the management team, they are uniquely capable and empowered to ensure that all stakeholders' interests are appropriately balanced, protected and preserved.

This Code provides principles to which members are expected to adhere and advocate. They embody rules regarding individual and peer responsibilities, as well as responsibilities to employers, the public, and other stakeholders. Violations of FEI's Code of Ethics may subject the member to censure, suspension or expulsion under procedural rules adopted by FEI's Board of Directors.

All members of FEI will:

- Act with honesty and integrity, avoiding actual or apparent conflicts of interest in personal and professional relationships.
- Provide constituents with information that is accurate, complete, objective, relevant, timely and understandable.
- Comply with applicable rules and regulations of federal, state, provincial, and local governments and other appropriate private and public regulatory agencies.
- Act in good faith, responsibly, with due care, competence and diligence, without misrepresenting material facts or allowing one's independent judgment to be subordinated.
- Respect the confidentiality of information acquired in the course of one's work except when authorized or otherwise legally obligated to disclose. Confidential information acquired in the course of one's work will not be used for personal advantage.
- Share knowledge and maintain skills important and relevant to constituents' needs.
- Proactively promote ethical behavior as a responsible partner among peers, in the work environment and the community.
- Achieve responsible use of and control over all assets and resources employed or entrusted.
- Report known or suspected violations of this Code in accordance with the FEI Rules of Procedure.
- Be accountable for adhering to this Code.

If you are interested in more details about the Academic, In-Transition, or Government/Military membership categories, please contact FEI's Membership Department via email, membership@financialexecutives.org or phone, 877.359.1070.