



THE INTERNATIONAL FORUM 2011 MEMBERSHIP APPLICATION

Phone: 800.499.0974

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Vision: To be *the* premier member organization most known for its uncensored exchange of emerging trends, competitive intelligence and innovative client solutions related to life insurance.

Background:

The International Forum was founded in 1973 to provide an opportunity for the free exchange of ideas and high level sales expertise between top producers in the life insurance profession.

The International Forum occupies a unique and colorful position in the life insurance industry. Some of the common ideas used by all underwriters today had their inception at Forum meetings. These ideas include life insurance in 401(k) plans, producer groups, agent reinsurance companies, broad-based corporate owned life insurance and no-load life insurance.

Forum Annual Meetings stress creativity and leading edge ideas. While the Forum values its Industry Partners, the association does not answer to any corporate sponsors or industry groups - we answer only to ourselves. Forum speakers know they must share their ideas in full and that they can be challenged from the floor. In the entire industry, there is no other organization that looks so deeply for the truth and for sharing of content from its speakers.

Forum members are an elite group, representing the top life insurance producers throughout the world and some of the best minds in the industry - willing to share with fellow members their innovative ideas for merchandising life insurance.

Member Requirements:

In addition to the production qualifications and other requirements outlined in this application, each member is required to:

- Willingly and openly share ideas
- Commit to excellence in the life insurance industry
- Think creatively to benefit clients
- Abide by Forum bylaws and philosophies
- Deal with clients and colleagues fairly and with integrity

ALL FIELDS ARE REQUIRED UNLESS OTHERWISE MARKED – PLEASE PRINT CLEARLY

FULL NAME AND DESIGNATIONS:

INFORMAL NAME:

SPOUSE NAME (OPTIONAL):

COMPANY NAME:

STREET ADDRESS:

ADDITIONAL ADDRESS:

CITY/STATE/ZIP (PROVINCE/COUNTRY CODE):

TELEPHONE:

FAX:

E-MAIL:

WEB SITE:

DATE OF BIRTH:

YEARS IN BUSINESS:

PRODUCER GROUP (IF APPLICABLE):

Office Use Only: Recvd _____ Appr _____ IP Ref _____ Batch# _____ LN _____

**ANNUAL DUES ARE \$925 FOR THE JANUARY 2011 – DECEMBER 2011 MEMBERSHIP YEAR AND
MUST ACCOMPANY THIS APPLICATION.**

I. QUALIFICATION CRITERIA I hereby certify that (check applicable criteria below):

- I qualify with \$500,000 of annual personal financial services income produced in 2010 for the 2011 membership year

I have provided the following type of documentation with this application, which proves that I have personally produced the required amount:

- personal income tax return
- personal commission statements
- current Top of the Table acceptance letter
- company broker/dealer income statements

II. PERSONAL PROFILE

A. Is your primary role:

- an advisor working with the end client a wholesaler/BGA working with advisors
- other (please specify): _____

Please describe your value proposition to the primary market you serve. Describe how you create value to your clients.

B. Please indicate, in increments of 10%, the percentage of the following areas of practice:

Areas of Market Focus:	Wealth Transfer	Executive Benefits	Employee Benefits	Financial Planning	Investment Management	Other (Define Below)	Total
	%	%	%	%	%	%	= 100%

Other Area of Market Focus (please specify): _____

What is your firm's product mix?	Life	Annuities	Long Term Care	Disability	Life Settlements	Investments	Corporate Benefits (e.g., Group Health, etc.)	Other (Define Below)	Total
		%	%	%	%	%	%	%	%

Other Product in the Mix (please specify): _____

C. Forum Activities: (Please enter number and dates):

	Number	Dates
<input type="checkbox"/> Number of Forum Annual Meetings attended:	_____	_____
<input type="checkbox"/> Number of Fast & Furious sales ideas presented:	_____	_____
<input type="checkbox"/> Number of Forum committees participated on:	_____	_____
<input type="checkbox"/> Number of Presentations Given at the Annual Meeting:	_____	_____

(Part C continued on next page)

- If asked to present at the annual meeting; what would your topic be? _____
- If asked to serve on a committee, would you serve? Yes No
- If asked to serve on the Board, would you serve? Yes No

D. 2010 Organizational and Industry Affiliations/Participation *(Please check ALL that apply):*

- | | |
|--|---|
| <input type="checkbox"/> Association for Advanced Life Underwriting (AALU)
<input type="checkbox"/> The American College
<input type="checkbox"/> Financial Planning Association (FPA)
<input type="checkbox"/> Heckerling Institute

<input type="checkbox"/> National Association of Insurance and Financial Advisors (NAIFA)
<input type="checkbox"/> Society of Financial Service Professionals (SFSP) | <input type="checkbox"/> American Bar Association (ABA)
<input type="checkbox"/> Estate Planning Council (EPC)
<input type="checkbox"/> General Agents and Managers Association (GAMA)
<input type="checkbox"/> Life and Health Insurance Foundation for Education (LIFE)
<input type="checkbox"/> Top of the Table (TOT)

<input type="checkbox"/> Other <i>(please specify)</i> _____ |
|--|---|

E. What significant changes in the marketplace do you see occurring in the next 3 years?

F. References

Two letters of reference are required from the Forum members you list below. There are three ways to submit referrals:

1. Attach the letters directly to this application
2. Ask references to submit their letters to The International Forum via mail (401 N. Michigan Avenue, Suite 2200, Chicago, IL 60611) or email (forum@int-forum.org)
3. Direct references to the website, where they can submit a referral online:
 - o <http://www.int-forum.org/Default.aspx?TabId=165&e=1>

Please note that the Forum may contact one or both of the Forum members listed below for further endorsement of your application for membership.

Reference 1

Reference 2

Name _____

Company _____

Address 1 _____

Address 2 _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

Years as Forum member _____

Name _____

Company _____

Address 1 _____

Address 2 _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

Years as Forum member _____

Letter submitted:

- with this application
- via mail/email
- on the Forum website

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At a minimum, references should answer the following questions: Why would the applicant be a good member?
 How long have you known the applicant? How do you know the applicant?

G. Please read carefully and initial beside each item below to indicate agreement:

- ___ Fundamental Doctrine of Forum Membership: I hereby agree to abide by the philosophies, ideas and exchange policy, Bylaws and Rules of the Annual Meeting of The International Forum.
- ___ I submit that I have never been convicted of a felony in the insurance, securities or financial services industry.
- ___ I hereby authorize The International Forum to obtain from any source whatsoever such additional information and documentation it shall deem advisable in connection with this membership application, and I hereby agree to cooperate fully on obtaining such additional information and documentation.
- ___ I express and warrant that everything on this application is accurate and true. The International Forum reserves the right to contact all individuals listed and verify in any way the information completed in this application.
- ___ I understand that false statements may result in rejection of my application to join The International Forum.
- ___ I acknowledge that submitting this application does not confirm membership and is subject to approval by The International Forum's membership committee and board of directors.
- ___ I understand that my name, the name of my company/firm, and the city and state in which I am located will be submitted to the full Forum membership for anonymous comment. These comments will be provided only to the membership committee and/or the board, and will be considered as part of my application.
- ___ If I do not meet the above-stated qualification requirement each year, I acknowledge my membership within the Forum will cease.
- ___ I understand that Forum membership is by invitation only. If my application is accepted, I will receive an invitation to join. If my application is rejected, I will receive a letter informing me of that fact and a full refund of any dues paid.

By initialing above and completing this application, I acknowledge and agree to the above terms of The International Forum.

Signature: _____ **Date:** _____

III. PAYMENT

Amount Enclosed: _____ (2011 dues \$925)	Check number: _____
<input type="checkbox"/> AMEX <input type="checkbox"/> MasterCard <input type="checkbox"/> Visa Card#: _____	Exp. Date: _____
Cardholder: _____	Signature: _____

If paying by check, complete and **return to The International Forum** with appropriate dues amount (in U.S. funds) and copies of supporting documentation, if applicable, to:

**The International Forum
8260 Solutions Center
Chicago, IL 60677-8002**

Payment of membership dues may be deductible as an ordinary and necessary business expense. Dues are not deductible as a charitable contribution for federal income tax purposes. Consult your tax advisor.

**The International Forum 2011 Annual Meeting
January 15-19, 2011
Sheraton Wild Horse Pass Resort & Spa - Phoenix, AZ**