



THE INTERNATIONAL FORUM 2010 MEMBERSHIP APPLICATION

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Mission Statement: To foster the independent, personal, business, and professional growth of the leading life insurance and financial services professionals in the world.

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 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

PLEASE PRINT AND COMPLETE ALL FIELDS

FULL NAME AND DESIGNATIONS:

INFORMAL NAME:

SPOUSE NAME:

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):

**ANNUAL DUES ARE \$900 FOR THE JANUARY 2010 – DECEMBER 2010 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 2009 for the 2010 membership year

Documentation Provided which proves that applicant has **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 working with advisors
- other

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

B. Please indicate the percentage of the following areas of practice:

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

What is your firm's product mix?			Long Term Care		Life Settlements		Corporate Benefits (e.g., Group Health, etc.)		Total
	Life	Annuities		Disability		Investments		Other (Define)	
	%	%	%	%	%	%	%	%	= 100%

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

- Number of Forum Annual Meetings attended:
- Number of Fast & Furious sales ideas presented:
- Number of Forum committees participated on:

Number

Dates

_____	_____
_____	_____
_____	_____

D. 2008 Organizational and Industry Affiliations/Participation *(Please check ALL that apply):*

- | | |
|----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Association for Advanced Life Underwriting (AALU) | <input type="checkbox"/> American Bar Association (ABA) |
| <input type="checkbox"/> The American College | <input type="checkbox"/> Top of the Table (TOT) |
| <input type="checkbox"/> Financial Planning Association (FPA) | <input type="checkbox"/> Estate Planning Council (EPC) |
| <input type="checkbox"/> Heckerling Institute | <input type="checkbox"/> General Agents & Managers Association (GAMA) |
| <input type="checkbox"/> Million Dollar Round Table (MDRT) | <input type="checkbox"/> Life |
| <input type="checkbox"/> Society of Financial Service Professionals (SFSP) | <input type="checkbox"/> National Association of Insurance and Financial Advisors (NAIFA) |
| | <input type="checkbox"/> Other: _____ |
| | <input type="checkbox"/> Other: _____ |

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

F. References

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

Reference 1

Name _____
Company _____
Address 1 _____
Address 2 _____
City _____ State _____ Zip _____
Phone _____
Fax _____
E-mail _____
Years as Forum member _____

Reference 2

Name _____
Company _____
Address 1 _____
Address 2 _____
City _____ State _____ Zip _____
Phone _____
Fax _____
E-mail _____
Years as Forum member _____

G. Please read carefully and check the boxes 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 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.
- If I do not meet the above stated qualification requirement each year, I acknowledge my membership within the Forum will cease.
- By checking the above boxes and completing the above reference section, I acknowledge and agree to the above terms of The International Forum.

Signature: _____ **Date:** _____

III. PAYMENT

Amount Enclosed: _____ (2010 dues \$900)	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
3015 Paysphere Circle
Chicago, IL 60674**

Payments 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 2010 Annual Meeting
January 16-20, 2010
Orlando, Florida
The Waldorf Astoria Orlando Resort & Spa