

APPLICATION FOR ASSOCIATE MEMBERSHIP



Please return completed application to the IAA via email: join@investmentadviser.org or mail: IAA, 818 Connecticut Ave, NW, Suite 600, Washington, DC 20006. Payment may be submitted with application, but it is not a requirement for submission. Your firm will be invoiced after receipt of application.
Membership does not and may not be used to imply IAA endorsement of any firm, products, services, or personnel.

Firm Contact Information - PLEASE PRINT OR TYPE ALL RESPONSES

Firm Name	Acronym	
Mailing Address	Suite/Floor Number	City, State & Zip Code
Telephone Number	Website	

Firm Information

1. Type of business: _____
2. Category on IAA Service Provider Directory (if applicable): _____
3. Is your firm currently registered as an investment adviser with the Securities and Exchange Commission (SEC)? ☐ Yes ☐ No
("No" is required for Associate Membership status)¹
4. How did you discover the IAA? _____

Firm Staff Information (Email addresses serve as the username for IAA online access.)

Primary Contact to the IAA for official matters and notices

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position		Email Address		
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Secondary Contact to the IAA for official matters and notices

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position		Email Address		
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Client/Business Contact will serve as the contact for interested clients (same person as primary ☐ or secondary contact ☐)

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position		Email Address		
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Billing Contact will serve as the contact for interested clients (same person as primary ☐ or secondary contact ☐)

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position		Email Address		
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Application Continues



Additional Contact

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position			Email Address	
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Additional Contact

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position			Email Address	
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Additional Contact

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position			Email Address	
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Additional Contact

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Additional Contact

☐ Mr. ☐ Ms.

First Name	Middle Name	Last Name	Suffix & Designation(s)	Preferred Name
Title/Position			Email Address	
Telephone Number	Fax Number	Address (if different from firm mailing address)		

Organization/Firm Logo & Description

Company description (400 character max):

If desired, please email a high-resolution jpg logo file to join@investmentadviser.org. Note that the IAA will resize, compress, and/or convert your logo to display on our website.

Your firm's IAA associate membership will allow an unlimited number of its employees to receive IAA associate member benefits.
If you have any questions, please contact the IAA office at (202) 293-4222.
Please attach additional pages to add more firm staff. Thank you!