



2020-2021 Membership Application

Membership Information

Join Nicsa to be a part of our network of over 9,000 business professionals in the global investment management industry. Membership gives your company and all employees the opportunity to learn, discuss and develop their industry knowledge. Your firm and employees will enjoy the additional benefits of networking while sharing best practices locally, nationally and globally.

Nicsa member firms are leaders in the investment industry. They represent the leading asset management firms as well as all of the leading service providers and professional service firms that support our industry. We are a committee driven association – be part of the team and make your impact on our association, your firm and our industry.

COMPANY INFORMATION (Please type or print)

Company Name: _____

Address: _____

City: _____ State: _____ ZIP Code: _____ Country: _____

Tel: _____ Fax: _____

Company Website: _____

Social Media Handles:

Facebook: _____

Twitter: _____

LinkedIn: _____

MEMBERSHIP CATEGORY

Membership Category	Number of Employees	Annual Investment
<input type="checkbox"/> Boutique	1-200	\$5,000
<input type="checkbox"/> Standard	201-10,000	\$7,500
<input type="checkbox"/> Diversified Firm <i>May request Standard dues rate if only one division of company is eligible for membership (subject to approval)</i>	10,001+	\$10,000

* Standard **member level** firms are permitted to add additional affiliated firms* to their membership for an **additional** \$1000 annually. A diversified membership member is allowed 5 additional affiliated firms * to be attached to their membership (subject to NICSA approval).

*An Affiliated Firm is an account where the organization is tied to the NICSA member firm but does not share the same email domain.

[DIVERSITY PROJECT NORTH AMERICA](#)

The Diversity Project North America is a Nicsa initiative that promotes a diverse and inclusive asset management industry with the right talent to deliver the best possible results for our clients, reflect the society we serve, and ensure long-term business sustainability. To learn more about the Diversity Project, please check the box.

NICSA COMMITTEE'S

Please indicate which of the following committees are of interest to your organization:

TOPIC COMMITTEES

- Abandoned Property Committee
- Alternative Investments Committee
- Compliance and Risk Management Committee
- Data Analytics Committee
- Product and Distribution Committee
 - SMA Working Group
- Next Gen Committee
- Retirement Committee
- Technology and Innovation Committee
- Transfer Agent Committee
- UIT Committee

FUNCTIONAL COMMITTEES

- Blackwell Scholarship Committee
- Content Committee
- Membership Committee
- NOVA Awards Committee
- Webinar Committee

Only board members can participate.

EVENT COMMITTEES

- General Membership Meeting Committee
- Strategic Leadership Forum Committee
- Regional Events Committee

Please feel free to contact NICSA at any time at:

p :: 508.683.1618 or e :: info@nicsa.org

METHOD OF PAYMENT

Payment total \$ _____

Please submit payment via ACH/wire transfer or by credit card.

Wire Instructions:

- 1. Bank name: SunTrust Bank, Greater Washington 2. Account number: 1000025892844
- 3. Routing/Transit number: 061000104
- 4. Swift code: SNTRUS3AWAS

Charge my credit card: AMEX MASTERCARD VISA

Card # _____ Exp. Date _____ CVC _____

Signature _____

CONTACT INFORMATION

Please choose an individual to serve as the primary contact Nicsa. The individual you choose will be added to our mailing list automatically, but other employees from your firm are welcome to add themselves at any time via www.nicsa.org.

Additionally, please provide the following: contact information for billing, HR, marketing and anyone else to be added preliminarily (if applicable).

Primary Contact (Name, Title, Email, Phone)

Billing Contact (Name, Title, Email, Phone)

HR Contact (Name, Title, Email, Phone)

Marketing/Corporate Communications Contact (Name, Title, Email, Phone)

Other Contacts (Name, Title, Email, Phone)

PLEASE MAIL, FAX OR EMAIL THIS COMPLETED FORM TO:

Nicsa

225 Franklin Street, 26th floor, Boston MA 02110

f :: 508.485.1560

e :: info@nicsa.org

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p :: 508.683.1618 or e :: info@nicsa.org