



FOUNDATION OF INDEPENDENT FINANCIAL ADVISORS

Application Form for Individual Membership

Surname : _____

First Name : _____

Middle Name : _____

Date of Birth : _____ Nationality: _____

ARN No.(Enclose copy) : _____ Valid upto: _____

PAN No. (Enclose copy) : _____

GST No. (Enclose Certificate) : _____

Business Name : _____

Business Address : _____

City : _____ State: _____

Pin Code : _____

Tel. No. (Office) : _____ Mobile No.: _____

Email id : _____

Website : _____

No. of Sub brokers : _____ No.No.of operational locations. _____

Assets Under Management (AUM) – Rs. _____

Res. Address : _____

City : _____ State: _____

Pin Code : _____

Qualification : _____

Membership Category: Trustee Patron Founder Life General Associate

Affix your
recent colour
photograph
and sign
across it.



FOUNDATION OF INDEPENDENT FINANCIAL ADVISORS

Membership Category	Fees in Rs.		
	Entrance Fees	Annual Fees	Total Fees
GST / IGST @18% *			
Total			

(Please fill in based on the Category Applied for)

(* For those members within Maharashtra, CGST and SGST at 9 % each would apply instead of IGST 18 %)

Payment Details

Amount (Rs.): _____ Cheque/DD/PO No. _____ Date: _____

Drawn on _____

I, _____ hereby solemnly undertake to abide by the Memorandum and Articles of Association of the Foundation.

I confirm that the Assets Under Management indicated above is as on _____

Signature : _____

Pace:

Date:

Proposed By : _____

(Name of the Member)

ARN No

Signature

Seconded By: _____

(Name of the Member)

ARN No

Signature



FOUNDATION OF INDEPENDENT FINANCIAL ADVISORS

ELIGIBILITY AND OTHER CONDITIONS:

An IFA being either an Individual above 18 years of age, a Company, a Partnership Firm, a Limited Liability Partnership, a Society or an Association of Persons, holding a valid AMFI Registration Number or any Association or Body of such IFA's shall be eligible for the membership of the Foundation.

The Board of Directors of the Foundation shall reserve the right in exceptional cases and looking at the benefit of the Foundation to admit an Individual above 18 years of age, a Company, a Partnership Firm, a Limited Liability Partnership or any other entity who or which is not holding registration number of AMFI as a member of the Foundation.

The decision of the Board of Directors with regard to the acceptance or rejection of an application for membership shall be final and the Board of Directors shall not be bound to assign any reasons for its decision.

Every applicant on being admitted to the membership of the Foundation shall be deemed to have agreed to conform to and abide by the Articles of Association as amended from time to time.

The membership of the Company shall be open to all the citizens of India.

A member may request to terminate his or her membership. No refunds of membership or other donations can be claimed at any time. Membership is not transferable.

Documents to be Submitted:

- 1) Self-Attested Copy of the PAN Card**
- 2) Self-Attested Copy of the ARN Card and Certificate**
- 3) Copy of GST Registration**