

Membership Application Form



The
Financial
Planners'
Guild,
India

Contact Information

Personal Information

IA Certification Year _____

Name: Mr. Ms. Mrs. Dr. _____ Date of Birth _____

Company _____ Your Title _____

Mailing Address _____

_____ City _____ State _____ PIN Code _____

Business Phone _____ Ext. _____ Business Fax _____

E-mail _____ Website _____

Home Phone _____ Mobile _____

Referred by _____

Basic Criteria for becoming a member

The following are the membership criteria that needs to be satisfied by aspiring candidates, to become members.

Proof to be submitted, wherever necessary –

1. Registered with SEBI as Investment Adviser (Send copy of appropriate docs)
2. They must be offering comprehensive financial planning / advisory services (A declaration that they are indeed offering Financial Planning Services and are charging a fee is required in the form of a letter)
3. They should be able to submit a Financial Plan they have made and if required, be able to create a plan based on data given. They should be prepared to be examined on the plan(s) submitted.(When submitting the plan, they need to declare by a letter that this is their original plan)
4. The candidate should be able to provide two references of clients, whom we will call and ascertain regarding services provided, satisfaction levels etc.

Payment Details

Membership Fees of Rs. 1000/- (Paid Annually) by Cheque in favor of “ The Financial Planners’ Guild, India”, payable at Mumbai

Cheque No.: _____ Date: _____ of Rs. 1000/-

from _____ Bank _____ Branch.

Alternatively, you could transfer the fee online, information for which will be provided to you.

Term and Conditions

I, _____ agree with all the terms & conditions including membership criteria laid down by The Financial Planners’ Guild, India.

Date _____

Place _____

Signature _____

Submit application and payment to :



The Financial Planners’ Guild, India

9, Neel Empire, Sector-25, Nerul, Near Jhama, in IDBI Bank lane,
Navi Mumbai -400706

Mob: 98200 25941; Off: 27722069; E-mail: team@fpgindia.org