



AFFILIATE APPLICATION

(Please print clearly—incomplete information will delay application process)

FULL PAYMENT MUST ACCOMPANY APPLICATION

AAA-CPA fees are not deductible as a charitable contribution for federal tax purposes, but may be deductible as a business expense.

1 AFFILIATE INFORMATION

.....
 FIRST NAME MIDDLE INITIAL

.....
 LAST NAME

.....
 FIRM NAME

.....
 STREET ADDRESS

.....
 CITY STATE ZIP

.....
 TELEPHONE FAX

.....
 EMAIL ADDRESS

.....
 FIRM WEBSITE

.....
 COLLEGE / UNIVERSITY YEAR

.....
 FEMALE MALE

.....
 BIRTH DATE (MM/DD/YY) GENDER

2 REFERRAL DIRECTORY INFORMATION

Please complete the following information so the Academy & your colleagues can refer clients to you.

TYPE OF PRACTICE (Check which applies)

ACCOUNTANT GOVERNMENT ATTORNEY
 EDUCATOR FINANCIAL PLANNER STUDENT
 OTHER

SIZE OF FIRM/PRACTICE (Check one)

1-5 PROFESSIONALS 6-14 15 OR MORE

PRACTICE AREAS (Insert up to 8 codes from list on back)

.....

3 AFFILIATE CATEGORY (Check one)

AFFILIATE (\$160 first year; second and thereafter \$320)—Individuals who qualify must (1) be a member of at least one Synergy Summit group OR (2) be a current member of a State Bar OR (3) be a currently licensed CPA in at least one state AND have earned one of the following credentials: ABV, AEP, CAP, CGMA, CFA, CFE, CFF, CIA, CMA, CVA, CFP, CTFA, LL.M., MST, PFP, PFS, or Board Certified by a State Bar in Taxation or Estate Planning

I qualify by the following (check all that apply):

- AMERICAN BAR ASSN.—REAL PROPERTY, TRUST & ESTATE LAW
- AMERICAN BAR ASSN.—TAX SECTION (ESTATE & GIFT TAX COMM.)
- AMERICAN INST. OF CERTIFIED PUBLIC ACCOUNTANTS—PFP SECTION
- AMERICAN INST. OF CERTIFIED PUBLIC ACCOUNTANTS—TAX SECTION
- NATIONAL ACADEMY OF ELDER LAW ATTORNEYS
- NATIONAL ASSOCIATION OF ESTATE PLANNERS AND COUNCILS
- PARTNERSHIP FOR PHILANTHROPIC PLANNING
- SOCIETY OF FINANCIAL SERVICE PROFESSIONALS
- SOCIETY OF TRUST AND ESTATES PRACTITIONERS
- STATE BAR (BAR # _____ STATE(S) _____)
- LICENSED CPA (CPA # _____ STATE(S) _____)

I have earned the following credential(s) (check all that apply):

- ACCREDITED ESTATE PLANNER (AEP)
- ACCREDITED IN BUSINESS VALUATION (ABV)
- BOARD CERTIFIED BY A STATE BAR IN TAXATION OR ESTATE PLANNING
- CERTIFIED FINANCIAL PLANNER (CFP)
- CERTIFIED FRAUD EXAMINER (CFE)
- CERTIFIED IN FINANCE FORENSICS (CFF)
- CERTIFIED INTERNAL AUDITOR (CIA)
- CERTIFIED MANAGEMENT ACCOUNTANT (CMA)
- CERTIFIED TRUST AND FINANCIAL ADVISOR (CTFA)
- CERTIFIED VALUATION ANALYST (CVA)
- CHARTERED ADVISOR IN PHILANTHROPY (CAP)
- CHARTERED FINANCIAL ANALYST (CFA)
- CHARTERED GLOBAL MANAGEMENT ACCOUNTANT (CGMA)
- MASTER OF SCIENCE IN TAXATION (MST)
- MASTERS OF LAW (LL.M.)
- PERSONAL FINANCIAL PLANNER (PFP)
- PERSONAL FINANCIAL SPECIALIST (PFS)

.....
 DATE CREDENTIALS OBTAINED ISSUED BY

EDUCATOR AFFILIATE (\$120)—An individual who teaches or has taught in the law or accounting department of an accredited college or university

.....
 ACCREDITED COLLEGE/UNIVERSITY PRACTICE FIELD

GRADUATE STUDENT AFFILIATE (\$60) — A graduate student with a focus on accounting or law for a period not to exceed five years

.....
GRADUATE COLLEGE / UNIVERSITY ATTENDING

FIELD OF STUDY LAW ACCOUNTING

.....
ANTICIPATED GRADUATION DATE

UNDERGRADUATE STUDENT AFFILIATE (\$0) — An undergraduate student with a focus on accounting or law for a period not to exceed five years.

.....
UNDERGRADUATE COLLEGE / UNIVERSITY ATTENDING

.....
FIELD OF STUDY ANTICIPATED GRADUATION DATE

I attest the information provided is true and accurate. I understand and agree this information may be audited by the AAA-CPA to ensure its accuracy, and that failing to provide accurate information may result in the loss of affiliate status. I attest that I meet the membership rules and eligibility requirements as outlined above and I agree to abide by the decisions of the Board of Directors as to the disposition of this application.

.....
SIGNATURE

.....
DATE

4 HOW DID YOU LEARN ABOUT THE AAA-CPA?

- MAILING WEBSITE MEETING
 MEMBER REFERRAL (Name if known)
 OTHER

FOR OFFICE USE ONLY

..... / .. / .. DATE RECEIVED
 CHECK NUMBER .. / .. / .. DATE PROCESSED
 .. / .. / ..
 MEMBERSHIP KIT SENT
 INITIALS

5 WHAT IS THE PRIMARY REASON YOU ARE JOINING THE AAA-CPA?

.....

6 WHAT DO YOU HOPE TO GET FROM THE AAA-CPA?

.....

7 PAYMENT INFORMATION

AMOUNT DUE \$

- CHECK (Payable to AAA-CPA)
 CREDIT CARD: VISA MASTERCARD AMEX

.....
CARD NUMBER EXP. DATE

.....
SIGNATURE TODAY'S DATE

DISCLOSURE: Individuals who meet the criteria for Regular Membership within the Association are not eligible for Affiliate status. For a complete list of membership eligibility, please visit our website at Attorney-CPA.com.



Mail Completed Form To: PO Box 706, Warrendale, PA 15095
Or Fax: (703) 352-8073 **Or Email:** info@Attorney-CPA.com

Need Help? Have Questions?
 Call: (888) ATTY-CPA or (703) 352-8064

PRACTICE AREAS

SPECIALTY	CODE	SPECIALTY	CODE
ACCOUNTING–AUDIT	AA	HEALTH CARE	HC
ACCOUNTING–MANAGEMENT	AM	IMMIGRATION	IM
ACCOUNTING–TAX	AT	INSURANCE	IN
ACCOUNTING–WRITE UP	AWU	INTELLECTUAL PROPERTY	INP
ADMINISTRATIVE LAW	AL	INTERNATIONAL	INTL
ALTERNATE DISPUTE RESOLUTION / MEDIATION	ADR	INTERNET LAW	IL
ANTI-TRUST & TRADE REGULATION	ATTR	LABOR & EMPLOYMENT	LE
APPELLATE PRACTICE	APP	LITIGATION–CIVIL	LC
ASSET PROTECTION	AP	LITIGATION–CRIMINAL	LCR
BANKING LAW	BL	LITIGATION–PERSONAL INJURY	LPI
BANKRUPTCY & INSOLVENCY	BI	MALPRACTICE, LEGAL OR ACCOUNTING	MLA
BUSINESS LAW	BUL	MEDICAL MALPRACTICE	MM
BUSINESS STARTUPS	BUS	MERGERS & ACQUISITIONS	MA
BUSINESS VALUATION	BV	OIL & GAS	OG
COLLECTION/REPOSSESSION	CR	PROBATE & TRUST	PT
COMMUNICATIONS	COMM	REAL ESTATE	RE
CORPORATE	CORP	SECURITIES LAW	SL
ELDER LAW	EL	TAX–FEDERAL	TF
EMPLOYEE BENEFITS	EB	TAX–INTERNATIONAL	TINTL
ENTERTAINMENT / SPORTS	ES	TAX–NON-PROFITS	TNP
ENVIRONMENTAL LAW	ENVL	TAX–STATE & LOCAL	TSL
ESTATE PLANNING / WILLS	EPW	TAX LITIGATION/CONTROVERSY	TLC
FAMILY LAW / DIVORCE	FLD	WORKERS COMPENSATION	WC
FINANCIAL PLANNING	FP	ZONING, PLANNING & LAND USE	ZPL
FORENSIC ACCOUNTING	FA		