American Academy *of* Attorney-CPAs

The power of the dual view

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

BIRTH DATE (MM/DD/YY) .... GENDER ☐ FEMALE ☐ MALE

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)*

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3 AFFILIATE CATEGORY *(Check one)*

☐ **AFFILIATE** ($150 first year; second and thereafter $300)—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** ($95)—An individual who teaches or has taught in the law or accounting department of an accredited college or university

ACCREDITED COLLEGE/UNIVERSITY .... PRACTICE FIELD

PO Box 706, Warrendale, PA 15095 • Phone (703) 352-8064 • Toll Free: (888) ATTY-CPA
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☐ **GRADUATE STUDENT AFFILIATE** ($45) — 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

CHECK NUMBER

INITIALS

___ / ___ / ___ DATE RECEIVED

___ / ___ / ___ DATE PROCESSED

___ / ___ / ___ MEMBERSHIP KIT SENT

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
ACCOUNTING–AUDIT	AA
ACCOUNTING–MANAGEMENT	AM
ACCOUNTING–TAX	AT
ACCOUNTING–WRITE UP	AWU
ADMINISTRATIVE LAW	AL
ALTERNATE DISPUTE RESOLUTION / MEDIATION	ADR
ANTI-TRUST & TRADE REGULATION	ATTR
APPELLATE PRACTICE	APP
ASSET PROTECTION	AP
BANKING LAW	BL
BANKRUPTCY & INSOLVENCY	BI
BUSINESS LAW	BUL
BUSINESS STARTUPS	BUS
BUSINESS VALUATION	BV
COLLECTION/REPOSSESSION	CR
COMMUNICATIONS	COMM
CORPORATE	CORP
ELDER LAW	EL
EMPLOYEE BENEFITS	EB
ENTERTAINMENT / SPORTS	ES
ENVIRONMENTAL LAW	ENVL
ESTATE PLANNING / WILLS	EPW
FAMILY LAW / DIVORCE	FLD
FINANCIAL PLANNING	FP
FORENSIC ACCOUNTING	FA

SPECIALTY	CODE
HEALTH CARE	HC
IMMIGRATION	IM
INSURANCE	IN
INTELLECTUAL PROPERTY	INP
INTERNATIONAL	INTL
INTERNET LAW	IL
LABOR & EMPLOYMENT	LE
LITIGATION–CIVIL	LC
LITIGATION–CRIMINAL	LCR
LITIGATION–PERSONAL INJURY	LPI
MALPRACTICE, LEGAL OR ACCOUNTING	MLA
MEDICAL MALPRACTICE	MM
MERGERS & ACQUISITIONS	MA
OIL & GAS	OG
PROBATE & TRUST	PT
REAL ESTATE	RE
SECURITIES LAW	SL
TAX–FEDERAL	TF
TAX–INTERNATIONAL	TINTL
TAX–NON-PROFITS	TNP
TAX–STATE & LOCAL	TSL
TAX LITIGATION/CONTROVERSY	TLC
WORKERS COMPENSATION	WC
ZONING, PLANNING & LAND USE	ZPL

