



REGISTERED FINANCIAL PLANNERS INSTITUTE PHILIPPINES
 Philippine Stock Exchange Center, Ortigas, Pasig City
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Attach passport
size picture

ASSOCIATE FINANCIAL PLANNER FORM

PERSONAL DATA

- Student
 Professional

Mr./Ms./Mrs./Miss/Dr. _____ Last/Family Name/Surname: _____
 First/Given Name: _____ Middle Name: _____ Suffix: _____
 Date of Birth (mm/dd/yyyy): ____ / ____ / ____ /

EDUCATION & PROFESSIONAL INFORMATION

- BACHELOR'S DEGREE** Year: _____
 Course: _____
 University: _____
- MASTERAL** **DOCTORAL** Year: _____
 Course: _____
 University: _____
- OTHER** _____ Year: _____
 Course: _____
 University: _____
 Licence No.: _____ Year: _____

AFP TRAINING PROVIDER:

PAYMENT INFORMATION

AFP Membership Fee Php 2,500

Please deposit at

CONTACT INFORMATION (Please indicate your contact preference)

HOME MAILING ADDRESS

Home / Bldg. No., Street: _____

 City: _____
 Province: _____ Postal Code: _____
 Phone Number: _____
 Mobile Number: _____
 Personal E-mail Address: _____

BUSINESS MAILING ADDRESS

Position: _____
 Company Name: _____

 Unit/Bldg. No., Street: _____

 City: _____
 Province: _____ Postal Code: _____
 Phone Number: _____
 Fax Number: (Country code/Area code/City code) _____
 E-mail Address: _____

ACCEPTANCE OF SUBSCRIPTION

I declare that all of the information contained in this application is true and correct and I agree to provide any supporting documentation requested by the Institute. If accepted, I agree to abide by the Registered Financial Planners Institute Philippines' Code of Professional Conduct and Continuing Professional Education requirements. I understand that I must renew my subscription annually to enjoy the services provided by the Institute including eligibility privileges and retention of professional designation.

Signature _____

Date: _____

OFFICIAL USE ONLY:

INVOICE NO. _____ INVOICE DATE: _____
 OR NO. _____ DATE PAID: _____
 DCR NO. _____ VERIFIED: _____

APPLICATION RECEIVED ON: _____

COMPLETED REQUIRED DOCUMENTS
 APPROVED MEMBERSHIP NO. _____
 NOT APPROVED REASON: _____