

MERGER & ACQUISITION MASTER INTERMEDIARY APPLICATION

Achieve the highest level of M&A accreditation through the Merger & Acquisition Master Intermediary designation program. Offered exclusively to experienced M&A Source members who have earned their Certified Business Intermediary (CBI®) plus satisfied additional requirements demonstrating their M&A level of expertise. The M&AMI designation affords members professional growth and marketability unlike any other and establishes members as seasoned and experienced intermediary professional to middle market clients.

REQUIREMENTS

- A completed application must be on file at M&A Source Headquarters to be considered a candidate for Merger & Acquisition Master Intermediary.
- Enclose a check in the amount of \$250 (candidate application and service fee).
- Enclose proof of three M&A transactions in which the total transaction value is one million dollars (U.S. dollars) or greater (excluding) real estate within five years of application.
- CBI in good standing.
- Attend/Instruct 32 hours of 300, 400, or 500 level courses over a five-year period.
- Attend three M&A Conference and Deal Mart Expos over a five-year period.

PERSONAL

Name (as you wish it to appear on the plaque)

FIRST: _____ MI: _____ LAST: _____

COMPANY: _____

ADDRESS: _____

CITY: _____ STATE/PROVINCE: _____

ZIP/MAIL CODE: _____ COUNTRY: _____

PHONE: _____ FAX: _____

EMAIL: _____ WEBSITE: _____

CBI CERTIFICATION

Recertification Period: From _____ Through _____

PAYMENT INFORMATION

(Make check payable to M&A Source)

CHECK VISA MASTERCARD AMEX

AMOUNT: \$ 250.00

ACCOUNT NUMBER: _____ EXP DATE: _____

SIGNATURE: _____

By your signature, you accept receipt of all fax and email communication and confirmation from IBBA and M&A Source.



401 Michigan Avenue • Suite 2200 • Chicago, IL 60611-4267
Phone 888-686-4222 • Fax 312-673-6599

APPLICATION FOR ADMISSION TO THE MERGER & ACQUISITION MASTER INTERMEDIARY PROGRAM (CONT.)

Transaction (3 Required)
#1
#2
#3

M&A Source Conferences Attended (3 required, list dates and locations)
#1
#2
#3

Courses (32 hours total, list course names, credit hours, dates attended)
#1
#2
#3
#4

Applications received by headquarters will be held until the next regular scheduled meeting of the Credentialing Committee. The committee will meet quarterly.

Please return application form and payment to:

M&A Source Headquarters
8305 Solutions Circle
Chicago, IL 60677-8003

Questions? Contact
M&A Source Headquarters
(888) 686-4222; Fax: (312) 673-6599
Email: admin@masource.org

*Or fax this form with credit card information to
M&A Source Headquarters at (312) 673-6599*

