

# M&A SOURCE MEMBERSHIP APPLICATION



## Member Information *Please provide the information as you would like it to appear in the directory.*

FULL NAME \_\_\_\_\_

COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE/PROVINCE \_\_\_\_\_

ZIP/MAIL CODE \_\_\_\_\_ COUNTRY \_\_\_\_\_

WORK PHONE \_\_\_\_\_ CELL \_\_\_\_\_ FAX \_\_\_\_\_

EMAIL \_\_\_\_\_ WEBSITE \_\_\_\_\_

DESIGNATIONS OR CERTIFICATIONS (check all that apply)

CBI  M&AMI  CSBA  CMEA  CPA  Other \_\_\_\_\_

PRIMARY ROLE IN THE TRANSACTIONS PROCESS (check all that apply)

Intermediary  Attorney  Accountant  Advisor  PEG  Other \_\_\_\_\_

TELL US ABOUT YOUR PRACTICE SIZE (check one)

Sole Practitioner  2-5  5-10  Over 10

DO YOU SPECIALIZE IN AN INDUSTRY? (if yes, please specify) \_\_\_\_\_

WHOM MAY WE THANK FOR REFERRING YOU? \_\_\_\_\_

*Information provided will be used to update your profile on The M&A Source website.*

## Annual Dues

M&A Source Membership Only \$495 \$ \_\_\_\_\_

CBI Recertification Fee \$55 \_\_\_\_\_

M&AMI Recertification Fee \$55 \_\_\_\_\_

**TOTAL TO BE BILLED/CHARGED** \$ \_\_\_\_\_ **Promo Code** \_\_\_\_\_

The M&A Source is a professional association. Membership dues are non-transferable and non-refundable. With your dues payment, you consent to receipt of all fax, mail and electronic communications from the M&A Source. You should consult your tax advisor for the appropriate treatment of your dues and expenses relating to your membership.

**Payment Information** *The Membership term is for twelve months from the commencement date and shall automatically renew for successive one year renewal term periods, with each renewal term beginning on the anniversary of the commencement date at The M&A Source then current annual dues for the class of membership subscribed to and charged to the credit card on file.*

Visa  Mastercard  American Express

CARDHOLDER NAME \_\_\_\_\_ AMOUNT \_\_\_\_\_

ACCOUNT NUMBER \_\_\_\_\_ EXP. DATE (MM/YY) \_\_\_\_\_ CRV# \_\_\_\_\_

AUTHORIZED SIGNER \_\_\_\_\_

BILLING ADDRESS \_\_\_\_\_

If you have a membership or billing question, contact The M&A Source Headquarters at 312-321-5112. Mail, fax, or email this application to:

**The M&A Source Headquarters • 8305 Solutions Circle • Chicago, IL 60677-8003**  
**FAX 312.673.6599 • EMAIL [admin@masource.org](mailto:admin@masource.org)**