

APPLICATION FOR ADMISSION TO THE MERGER & ACQUISITION MASTER INTERMEDIARY PROGRAM

REQUIREMENTS

1. A completed application must be on file at M&A Source Headquarters to be considered a candidate for Merger & Acquisition Master Intermediary.
2. Enclose a check in the amount of \$250.00 (candidate application and service fee).
3. 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 (see summary sheet for additional details).
4. Arrange for verification of educational and conference qualifications to be forwarded to the Merger & Acquisition Master Intermediary Credentials Committee

PERSONAL

Mr. Ms. Mrs. Miss

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: _____ WEB SITE: _____

CBI CERTIFICATION

Recertification Period: From _____ Through _____

PAYMENT INFORMATION

(Payable to M&A Source)

CHECK VISA MASTERCARD AMEX

AMOUNT: \$ _____

CARDHOLDER NAME: _____

ACCOUNT NUMBER: _____ EXP DATE (MM/YY): _____

SIGNATURE: _____

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

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

Transactions (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

Please return application form and payment to:
M&A SOURCE® HEADQUARTERS
 4365 Paysphere Circle
 Chicago, IL 60674

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

Applications received at headquarters will be held until the next
 regular scheduled meeting of the Credentials Committee.

Questions? Contact
M&A SOURCE®
 401 N. Michigan Avenue
 Chicago, IL 60611-4267
 (888) 686-4222; Fax: (312) 673-6599
 Email: admin@masource.org