

MEMBERSHIP UPGRADE FORM

Please complete this form in full, by computer or by hand, printing clearly in black or blue ink.

If you have any questions regarding your membership upgrade form, please contact membership@finsia.com or call us on **1300 346 742**.

Completed forms should be returned to:  FINSIA, PO Box H99, Australia Square, NSW 1215  membership@finsia.com

PERSONAL DETAILS

Membership ID:

Full Name:

Mr/Mrs/Ms/Miss
/Dr/Prof/Other:

Date of Birth (DD/MM/YY):

Phone:

Contact Address:

City:

State:

Post Code:

Email:

If your application for an upgrade is accepted, your new membership certificate will be sent to the contact address on your record. Please ensure your address details are up-to-date.

REQUEST FOR UPGRADE

Please select the new category of membership you wish to apply for:

Senior
Fellow

Fellow

Senior
Associate

Associate

Please ensure that your application satisfies **one or more of the following criteria** for upgrade as required by FINSIA By-Laws:

- a. academic qualification plus appropriate industry or finance related experience
- b. contribution to FINSIA (please see definitions on page 2 of this form)
- c. contribution to the financial services industry or a field of endeavour associated with it (please see definitions on page 2 of this form).

Visit www.finsia.com/membership under Membership Categories for specific requirements.

To apply for an upgrade, please complete the following and return to FINSIA by email to membership@finsia.com. Please attach copies of original qualifications or original transcripts with this form. FINSIA reserves the right to allocate membership categories as appropriate.

MEMBERSHIP UPGRADE FORM

A. QUALIFICATIONS

1. Qualification:	Doctorate	Masters	Graduate Diploma	Bachelor Degree	Diploma	Certificate
University/Institute:			Discipline:		Year completed:	
2. Qualification:	Doctorate	Masters	Graduate Diploma	Bachelor Degree	Diploma	Certificate
University/Institute:			Discipline:		Year completed:	
3. Qualification:	Doctorate	Masters	Graduate Diploma	Bachelor Degree	Diploma	Certificate
University/Institute:			Discipline:		Year completed:	
4. Qualification:	Doctorate	Masters	Graduate Diploma	Bachelor Degree	Diploma	Certificate
University/Institute:			Discipline:		Year completed:	
5. Qualification:	Doctorate	Masters	Graduate Diploma	Bachelor Degree	Diploma	Certificate

Please indicate years of relevant industry experience

Less than 3 years	3-4 years	5-6 years	7-14 years	15-24 years	25+ years
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CONTRIBUTION TO FINSIA OR FINANCIAL SERVICES INDUSTRY

B. Number of years of contribution to FINSIA? (This includes service on committees, mentoring program and boards)

Less than 3 years	3-4 years	5-6 years	7-9 years	10 years or more
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C. Number of years of contribution to the financial services industry? (Beyond normal job requirements - please see definitions over page)

Less than 3 years	3-4 years	5-6 years	7-9 years	10 years or more
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Please attach a document providing comprehensive details of your contributions to FINSIA and / or the financial services industry as explained in important definitions on page 2 of this form.

I hereby certify that the information provided is true and correct.

Signature _____ Date _____

MEMBERSHIP UPGRADE FORM

IMPORTANT DEFINITIONS

Contribution to FINSIA is based upon the many ways in which members serve the aims and objectives of FINSIA. Examples would include serving as an active FINSIA Education practitioner over a period of time or serving on a FINSIA committee, council or Board.

Contribution to the financial services industry is defined as relating to services that **further the industry rather than an individual's personal career**, and can be seen in activities that require considerable investment of time and effort beyond day-to-day job requirements. It is recognised that in some instances this may be paid via honoraria or market rates.

Typically, contribution to the financial services industry would fall into one of the following categories:

1. The applicant has made a significant contribution to the financial services industry by driving innovations in policies, techniques or processes that advance the industry in some manner; or
2. The applicant has furthered the contribution of the financial services industry to the community in general, or enhanced the profile and credibility of the financial services industry through, for example, significant contributions to the work of charitable or not-for-profit organisations or via government tribunals, committees or taskforces.

MEMBERSHIP CATEGORIES

THERE ARE SEVERAL MEMBERSHIP LEVELS, WHICH ARE BASED ON YOUR ACADEMIC QUALIFICATIONS PLUS INDUSTRY EXPERIENCE, CONTRIBUTIONS TO FINSIA OR THE WIDER FINANCIAL SERVICES INDUSTRY. WITH MOST LEVELS YOU GAIN INDUSTRY RECOGNITION THROUGH THE USE OF POST NOMINALS. THESE CREDENTIALS, PLACED AFTER YOUR LAST NAME, SIGNIFY YOUR STATUS AS A RESPECTED AND WELL-INFORMED INDUSTRY PROFESSIONAL. FINSIA'S MEMBERSHIP CATEGORIES ARE:

Affiliate* (no post nominal) - Affiliate members are individuals with no formal tertiary qualifications, or personal investors and those with an interest in financial services.

Associate (A FIN) - To upgrade to Associate level, members must have at least 3 years career experience working in the financial services industry and have a recognised Finance related Bachelor degree from an accredited education provider.

Senior Associate (SA FIN) - To upgrade to Senior Associate level, members have at least 5 years career experience working in the financial services industry and have a recognised Finance related postgraduate qualification from an accredited education provider. Alternatively, you can reach Senior Associate level with an appropriate professional qualification e.g. [FINSIA's Certified Professional Banker](#).

Fellow (F FIN) - To upgrade to Fellow level, members have at least 15 years career experience working in the financial services industry and have a recognised Finance related postgraduate qualification from an accredited education provider, as well as demonstrating significant contribution to the industry. Alternatively, you can reach Fellow level if you have 15 years of professional experience in the Finance industry and an appropriate professional qualification e.g. [FINSIA's Chartered Banker](#).

Senior Fellow (SF FIN) - by invitation only by the FINSIA Board and provided to those professionals who are suitably qualified and have given a significant contribution to FINSIA and/or the financial services industry.

*Excludes voting rights and carries no post nominal.

Contribution in all categories should be above and beyond normal job requirements for the benefit of the wider financial services industry.



MEMBERSHIP UPGRADE FORM

CONTACT US

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