National Association of Plan Advisors
2012 Firm Partner Application

Primary Contact:

Name: ______________________

Company: ______________________

Title: ______________________

Street Address: ______________________

City: ______________________

State: ____________ Zip Code: ____________

Phone: ____________ Fax: ____________

E-mail Address: ______________________

Administrative Contact:

Name: ______________________

Company: ______________________

Title: ______________________

Street Address: ______________________

City: ______________________

State: ____________ Zip Code: ____________

Phone: ____________ Fax: ____________

E-mail Address: ______________________

Type of Business *(Choose the one that most closely describes your business):*

❑ Broker-Dealer
(A majority of our Registered Representatives are advisors who are primarily in the business of providing investment advisory services to plan sponsors and/or individual investors)

❑ RIA

❑ Both Recordkeeper & DCIO

❑ Recordkeeper

❑ Non-Recordkeeping TPA

❑ Defined Contribution Investment Only

❑ Other______________

2012 Firm Partner Dues:

As a 2012 NAPA Firm Partner, an unlimited number of your employees, Registered Representatives and/or Investment Advisory Representatives (IARs) may enroll and receive full NAPA membership benefits at no cost to them through December 31, 2012, a savings of $395 per member.

Enter your firm's dues based on the table below: __________

Total Employees, RRs and IARs in the Firm*	Firm Dues through 12/31/12
1-5	$500
6-25	$1,000
26-50	$2,500
51-250	$5,000
251-500	$7,500

Total Employees, RRs and IARs in the Firm*	Firm Dues through 12/31/12
501-1,000	$10,000
1,001-2,000	$12,500
2,001-3,000	$15,000
3,001-5,000	$20,000
5,000+	$25,000

Payment Contact: *(if different from Administrative Contact)*

Name: ______________________

Company: ______________________

Title: ______________________

Street Address: ______________________

City: ______________________

State: ____________ Zip Code: ____________

Phone: ____________ Fax: ____________

E-mail Address: ______________________

Payment Type:

❑ Send me an invoice

❑ I will transfer my payment electronically to NAPA *(instructions will be emailed to Payment Contact upon receipt of signed application)*

❑ I will pay by Credit Card

❑ Mastercard ❑ Visa ❑ Amex ❑ Discover

Name as it appears on card: ______________________

Card No.: ______________________

Exp. Date: ______________________

Please enroll my firm as a NAPA Firm Partner through December 31, 2012. I understand that an unlimited number of our employees, Registered Representatives and/or Investment Advisory Representatives (IARs) may enroll and receive full NAPA membership benefits at no cost to them through December 31, 2012, a savings of $395 per member. In addition, by joining before January 15, 2012 my firm will be listed as a "NAPA Founding Partner" on NAPA and The ASPPA 401(k) SUMMIT marketing materials. I also understand that we may renew our Firm Partner status automatically by checking the box below.

❑ Auto Renewal

Signature: ______________________ Printed Name ______________________

Title: ______________________ Date: ______________________

Please fax your completed application to **703.516.9308** or mail it to: NAPA, P.O. Box 34725, Alexandria, VA, 22334-0725. Questions? Contact Jeff Hoffman, Sr. Director of Business and Membership Development at **jhoffman@asppa.org** or **703.516.9300**.

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Tax Deductions:
Dues, contributions or gifts to NAPA are not deductible as charitable contributions; they may be deductible, however, as ordinary and necessary business expenses. Federal law prohibits a tax deduction for the portion of membership dues attributable to lobbying expenses incurred by the organization. Consequently, for 2012, 22% of your dues are non-deductible in accordance with this provision.

NAPA
NATIONAL ASSOCIATION OF PLAN ADVISORS

National Association of Plan Advisors (NAPA)
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