

## Application for General Membership

Any incorporated entity, educational institution, association or other group interested in the work of CII General Membership is open to public and private employee benefit plans, state or local agencies officially charged with investing public fund assets (such as state investment boards) and charitable tax-exempt foundations and endowments, subject to following limitation: Private-sector employee benefit plans may not join as voting members if the plan or plan sponsor's primary line of business includes providing financial, consulting, legal or other services to institutional investors. Funds, not their employees, are considered CII members. General Members are entitled to one vote per fund.

Annual dues for CII members are billed on a calendar year and are calculated based on total assets in employee defined benefit and defined contribution plans. Where possible, CII uses figures reported annually by the Pensions and Investments (P&I) Research Center. For retirement plan assets, we base dues on total defined benefit (DB) plus defined contribution (DC) assets.

Please select one from the following types of memberships:

**Bundled Membership - \$0.95 per \$1 million in total assets**

Includes access to all of CII's research, education, education, membership databases and advocacy tools as well as attendance fees for employees to attend CII's two annual conferences per year. The minimum dues payment for the bundled membership is \$5,000 and the maximum is \$30,000 per calendar year. Complimentary conference attendance limits\* are based on the following annual dues scale:

- \$5,000-10,000 = 3 conference attendees per event
- \$10,001-\$14,999 = 4 conference attendees per event
- >\$15,000 = unlimited attendees

This membership type has a minimum dues level of \$5,000 and a maximum of \$30,000 in annual dues. Members who are at the maximum rate will be billed increases indexed with U.S. inflation rates beginning in 2019.

\*Trustees of public pension funds are exempt from these limits.

**Unbundled Membership - \$0.65 per \$1 million in total assets**

Includes access to all of CII's research, education, education, membership databases and advocacy tools with additional conference attendance fees of \$1,500 per attendee, per conference paid separately. This membership type has a minimum dues level of \$3,500 and a maximum dues level of \$24,000. Members who are at the maximum rate will be billed increases indexed with U.S. inflation rates beginning in 2019.

**Please provide all applicable data for your organization:**

Legal name of organization: \_\_\_\_\_

Abbreviated name or acronym (if applicable): \_\_\_\_\_

Number of employees: \_\_\_\_\_ Global assets under management: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

Web site: \_\_\_\_\_

Reason for joining CII: \_\_\_\_\_

\_\_\_\_\_

Physical address: \_\_\_\_\_

Mailing address: \_\_\_\_\_

**Please provide all applicable data for your organization's contacts and mark if they should be included in CII's online directory:**

Please note: there is no limit to the number of employees that may have access to our membership benefits, excluding conference attendance. If you have additional contacts please forward complete contact details by email along with your completed application.

**Main Organization Representative**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):  
\_\_\_\_\_

**Invoicing Representative (if different from main representative)**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

\_\_\_\_\_

**Proxy Voting Contact (if applicable):**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

\_\_\_\_\_

**Trustee Administrator/Board Secretary:**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

\_\_\_\_\_

**Additional Contact:**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

\_\_\_\_\_

**Additional Contact:**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

\_\_\_\_\_

**Additional Contact:**

Name: \_\_\_\_\_ Online Directory: Yes / No

Title: \_\_\_\_\_

Direct phone: \_\_\_\_\_ Email: \_\_\_\_\_

Do you agree to receive email correspondence from the association and its members? Yes / No

Mailing address (if different than organization):

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