



Association of  
Financial Advisers  
(Singapore)

## **ASSOCIATION OF FINANCIAL ADVISERS (SINGAPORE)**

### **Representative Membership**

**AFA(S) was established in 2001 with the vision of group influence, and the empowerment to guide our industry that is stronger than at the individual level.**

**In the beginning, the AFA(S) Membership was restricted only to Licensed Financial Advisers or Exempt Financial Advisers (Firms), However, in the last decade, we have worked hard to change this Constitution to include Financial Advisers Representatives as Members of AFA(S)**

**The Main Objectives of AFA(S) are:**

- 1. To provide a forum for Members to shape the development of the FA Industry**
- 2. To advance the interests of its Members and**
- 3. To raise the profile of its Members**

**The benefit of joining the AFA(S) as Representative Members are:**

- 1. To attend educational sessions and conferences at discounted fees**
- 2. To secure Professional Indemnity Insurance at attractive terms and premiums**
- 3. To put the name "Representative Member of the Association of Financial Advisers (Singapore) - AFA(S)" on their business cards thereby informing the public that they do keep abreast of developments in the Industry**



**ASSOCIATION OF FINANCIAL ADVISERS (SINGAPORE)**  
**Application for Representative Membership**  
**Term 01.02.2024 to 31.01.2025**

|   |                           |   |                              |              |
|---|---------------------------|---|------------------------------|--------------|
| <b>Application Status</b>   | New ( )                   |   | Renewal ( )                  |              |
| Full Name: Mr/Miss/Mdm/Dr   | DOB:                      |   | NRIC:                        |              |
| Nationality:  | MAS RNF No:               |   | Date of Issue:               |              |
| Advisory Firm:  | Office Telephone:         |   |                              |              |
| Office Address:   |                           |   |                              |              |
| Corporate Email:  | Mobile Contact:           |   |                              |              |
| Alternative Mailing Address:  |                           |   |                              |              |
| <b>CLASSES OF BUSINESS (Please tick)</b>  |                           |   |                              |              |
| Life insurance  | Investment                | General Insurance                         | Fee Based Financial Planning | Others       |
|   |                           |   |                              |              |
| <b>YEARS IN FINANCIAL INDUSTRY (Please tick)</b>  |                           |   |                              |              |
| 1 to 5  | 6 to 10                   | 11 to 15                                  | 16 - 20                      | 20 and Above |
|   |                           |   |                              |              |
| <b>CONCENTRATION OF BUSINESS (Please tick)</b>  |                           |   |                              |              |
| Local Clientele ( )   |                           | Expatriate Clientele ( )                  |                              |              |
| <b>HIGHEST ACADEMIC QUALIFICATION (Please tick)</b>   |                           |   |                              |              |
| GCE 'O' Level ( )   | GCE 'A' Level ( )         | Diploma : ( )                             | Tertiary : ( )               | Others : ( ) |
| <b>HIGHEST PROFESSIONAL QUALIFICATION (Please tick)</b>   |                           |   |                              |              |
| CLU ( )   | CFP ( )                   | Diploma in Financial Planning ( )         |                              |              |
| ChFP ( )  | ChFC ( )                  | IBF Certification Level 1 ( ) 2 ( ) 3 ( ) |                              |              |
| <b>Annual Subscription</b>  |                           |   |                              |              |
| Feb 2024 to Jan 2025 : S\$ 50.00 ( )  |                           | May 2024 to Jan 2025 : S\$ 37.50 ( )      |                              |              |
| Aug 2024 to Jan 2025 : S\$25.00 ( )   |                           | Nov 2024 to Jan 2025 : S\$12.50 ( )       |                              |              |
| Entrance Fee: \$50.00 (One-Time Payment) This fee will be waived if Professional Indemnity Policy is applied together |                           |   |                              |              |
| Payment Mode:   | Interbanking Transfer ( ) |   | PayNow Transfer ( )          |              |
| AFA(S) UOB Corporate Account : 119 312 9167   |                           | AFA(S) PayNow Account: UEN T01SS0031BT01  |                              |              |

**DECLARATION**

AFA(S) is committed to protecting our Members and Members Personal Data in accordance with the Singapore Protection Data Protection Act (PDPA)

In line with PDPA, by submitting this form, I hereby give my consent to AFA(S) to collect, use and disclose my personal data for the purposes of administering and processing of payments for membership and events and/or to receive further information from AFA(S) and/or for communication pertaining to my membership, event and course information.

I am aware that I may update the personal data and/or withdraw the consent provided by me at any time by contacting [secretariat@afas.org.sg](mailto:secretariat@afas.org.sg) or to subscribe via AFA(S) emails.

I hereby declare that the above declaration is true.

I consent and authorise AFA(S) to verify and call for any documentary evidence in support of my application.

I understand that the entrance fee and annual subscription paid are non-refundable.

.....  
Signature of Applicant

.....  
Dated