



APPLICATION FOR ADMISSION

Instructions

- Please type or print clearly. Make certain all information is complete and accurate. Sign and date the form in ink
- Arrange to have two character reference forms completed and sent to the AM&AA office

Background Information

Name (As you want it to appear on the certificate)

Last: _____ First: _____ MI: _____

Business Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Email: _____ Website: _____

Practice Information

1. Years experience in this profession: _____
2. Your Position: Owner Independent Contractor
 Officer Other _____
3. Number of Professionals who work in your office/firm.
 1-5 6-10 11-50 51-500 500+
4. Location of Other Offices (City, State) _____

Advisor Classification: Check for the most appropriate for your CURRENT professional/business affiliation

- | | |
|--|---|
| <input type="checkbox"/> Accountant/CPA | <input type="checkbox"/> Lender/Finance |
| <input type="checkbox"/> Attorney | <input type="checkbox"/> M&A Intermediary |
| <input type="checkbox"/> Business Valuator | <input type="checkbox"/> Management Consultant (all types) |
| <input type="checkbox"/> Corporate Development/Planning | <input type="checkbox"/> Personal Financial Planner/Money Mgt |
| <input type="checkbox"/> Estate/Exit Planning | <input type="checkbox"/> Private Equity/Investor |
| <input type="checkbox"/> Investment Banker/Broker Dealer | <input type="checkbox"/> Technology Specialist <input type="checkbox"/> Other _____ |

| Education | (Degree) | (University/College) | (Date) |
|-----------|----------|----------------------|--------|
|-----------|----------|----------------------|--------|

- | | | | |
|------------------------------------|-------|-------|-------|
| <input type="checkbox"/> Bachelors | _____ | _____ | _____ |
| <input type="checkbox"/> Masters | _____ | _____ | _____ |
| <input type="checkbox"/> Doctorate | _____ | _____ | _____ |
| <input type="checkbox"/> Other | _____ | _____ | _____ |

Character References: List 2 and their email address

1. _____
2. _____

Associations and Other Affiliations (Check all that apply)

American Bar Association (ABA)
 American Institute of Certified Public Accountants (AICPA)
 American Society of Appraisers (ASA)
 Association for Corporate Growth (ACG)
 Association of Certified Turnaround Professionals (ACTP)
 Family Firm Institute (FFI)
 Financial Industry Regulatory Authority (FINRA)
 Financial Planning Association (FPA)

Institute of Management Accountants (IMA)
 Institute of Management Consultants (IMC)
 International Bar Association (IBA)
 International Business Brokers Association (IBBA)
 National Assoc. of Certified Valuation Analysts (NACVA)
 Turnaround Management Association (TMA)
 Other _____

Professional Licenses/Certifications (check all that apply)

Accredited in Business Valuation (ABA)
 Bar Member (Country)/(States) _____
 Certified Business Appraiser (CBA)
 Certified Business Counselor (CBC)
 Certified Business Intermediary (CBI)
 Certified Financial Planner (CFP)
 Certified Management Consultant (CMC)
 Certified Public Accountant (CPA)

Certified Turnaround Professional (CTP)
 Certified Valuation Analyst (CVA)
 Chartered Financial Analyst (CFA)
 Certified Financial Consultant (CFC)
 Chartered Life Underwriter (CLU)
 Registered Financial Planner (RFP)
 Registered Investment Advisor (RIA)
 Series 79 Other _____

Types of M&A and Corporate Financial Advisory Services you provide to your clients

_____ % Business Valuations
 _____ % Buyer Representation
 _____ % Due Diligence Reviews
 _____ % ESOP'S & Employee benefits
 _____ % Estate planning
 _____ % Insurance
 _____ % Legal Services
 _____ % Personal Financial Planning

_____ % Private Equity Investor
 _____ % Private Money Mgt. Services
 _____ % Profit/Performance Improvement
 _____ % Seller Representation
 _____ % Strategic Planning
 _____ % Systems Consulting
 _____ % Tax & Accounting
 100 % **TOTAL**

Membership Agreement:

The undersigned individual hereby applies for membership in the Alliance of Merger & Acquisition Advisors® (AM&AA) and if accepted, agrees to comply with its bylaws, rules, and regulations and pay annual dues in advance in the amount of \$495 upon acceptance. Thereafter, annual dues are payable on the first of the month following the anniversary of the acceptance date below.

By virtue of membership in AM&AA, members have access to information, materials, and association relationships not generally available. In consideration of these and other benefits received by members of AM&AA, applicant agrees to conform to the bylaws of AM&AA. Further, upon termination of membership, applicant agrees to discontinue using any materials which indicate it is affiliated with AM&AA and destroy any marketing materials or publications produced by, for, or with the assistance of AM&AA and return any manual, seminars, or other materials provided by, or for, AM&AA immediately upon termination of membership.

Website/Internet Agreement:

The undersigned individual hereby grants permission to AM&AA to post any written materials by the member that would benefit AM&AA's members and/or business clients at www.amaaonline.org

APPLICANT:

By: _____

Title: _____

Date: _____

ACCEPTED:

By: _____

CM&AA Certification Committee

Date: _____

Alliance of Merger & Acquisition Advisors®
 200 E. Randolph St, 24th Floor Chicago, Illinois 60601
 Phone: 877-844-2535 Fax: (312) 729-9800 Website: www.amaaonline.org



Program Dates and Payment Methods

2012 Training Program Dates

Los Angeles, CA (Pepperdine)**

Feb 13 - 17

Dec 3 - 7

Charlotte, NC (Wake Forest)

March 5 - 9

Oct 15 - 19

Chicago, IL (DePaul)

April 16 - 20

Sept 17 - 21

Cost of the 5-day program: \$3,995

Includes: AM&AA membership for 1 year
5 day training program, exam fees
1 Business ValueXpress (BVX) software license for 1 year.
Binder of powerpoint presentations – distributed on day 1
Support materials available in virtual dataroom

Cost of the 4 textbooks: Approximately \$285 through Amazon to be ordered by attendee

NEW Middle Market M&A Handbook by AM&AA contributing authors
Private Capital Markets - 2nd Ed. by Rob Slee
The Handbook of Financing Growth - 2nd Ed. by Kenneth H. Marks
Valuation for M&A: Building Value in Private Companies – 2nd Ed
by Chris M. Mellen and Frank C. Evans

Payment Methods:

Check or Money Order

Credit Card

Master Card

Card Number: _____

Visa

Expiration Date: _____ Sec. Code _____

American Express

Signature: _____

Alliance of Merger & Acquisition Advisors
200 E Randolph St., 24th Floor
Chicago, IL 60601

Attn: AM&AA Committee on Certification

AM&AA Headquarters

Phone: 1-877-844-2535

Fax: 312-729-9800

Email: info@amaaonline.org

Web: www.amaaonline.org

