



## INSTITUTIONAL TRIAL APPLICATION

### FROM: \_\_\_\_\_ CHAPTER

### February 28 Deadline

Our purpose is to help highly successful professionals like you make better loan and risk management decisions. By sharing the latest techniques through our chapter meetings, conferences, and round tables, we provide unique opportunities for you to hear the industry's best lenders and risk managers. Our publications and information services will keep you current with the industry's best practices, helping to substantially increase your base of profitable commercial loans and business relationships.

This application entitles FIRST TIME MEMBERS up to \$2000 off RMA's Annual Dues. RMA's fiscal year is 9/1-8/31.

You will receive the *RMA Journal* 10 times a year along with updates on the latest RMA products and services. At the local level you will have full access and invitations to local chapter events. Included with your membership is a copy of RMA's *Annual Statement Studies*. Plus throughout the year you will receive special reports/hot topics of interest, which may also be accessed through RMA's **Members-Only Web site**.

Please complete this form and return it to RMA Member Services, 1801 Market Street, Suite 300, Philadelphia, PA 19103 (Fax 215-446-4101). (Enclose no money, RMA will bill you.)

Questions? Please call us at 800-677-7621, prompt #2, or e-mail us at [member@rmahq.org](mailto:member@rmahq.org).

#### I. Institutional Information (Please Print or Type)

Full Institution Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Main Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ Institution's Web Site: \_\_\_\_\_  
 Type of Institution: \_\_\_\_\_ Is your institution an affiliate of a holding company? No  Yes   
 If yes, name of holding company: \_\_\_\_\_ City: \_\_\_\_\_ State \_\_\_\_\_  
 Chief Executive Officer (CEO): \_\_\_\_\_  
 Financial data as of (12/31 previous year): Total Assets: \$ \_\_\_\_\_ (required)

#### II. Name Your Associates

A. **Senior Associate**  Mr.  Ms.  Mrs. Title (e.g., EVP, SVP, etc.): \_\_\_\_\_  
 Last Name: \_\_\_\_\_ First: \_\_\_\_\_ MI: \_\_\_\_\_ Nickname: \_\_\_\_\_  
 Business Address (if different than above): \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

**This section must be completed in order to properly process your application.**

#### Which best describes your job function? (Check one only.)

- |  |  |  |   |
|--|--|--|---|
| <input type="checkbox"/> Auditor                 | <input type="checkbox"/> CEO/President               | <input type="checkbox"/> COO/CFO/Managing Director | <input type="checkbox"/> CPA/Attorney/Appraiser       |
| <input type="checkbox"/> Credit Admin/Department | <input type="checkbox"/> Credit Policy Officer       | <input type="checkbox"/> Government Agency         | <input type="checkbox"/> Human Resource/Training Dir. |
| <input type="checkbox"/> Insurance               | <input type="checkbox"/> Loan Review/Administration  | <input type="checkbox"/> Nonbank/Nonfinancial      | <input type="checkbox"/> Portfolio Management Officer |
| <input type="checkbox"/> Regulator/Examiner      | <input type="checkbox"/> Relationship Manager/Lender | <input type="checkbox"/> Risk Management Officer   | <input type="checkbox"/> Secretary/Admin Asst         |
| <input type="checkbox"/> Securities Lending      | <input type="checkbox"/> Securities Trader           | <input type="checkbox"/> Senior Line Manager       | <input type="checkbox"/> Student                      |
| <input type="checkbox"/> Underwriter/Analyst     | <input type="checkbox"/> University/Librarian        |  |   |

**Which best describes your area of specialty? (Check one only.)**

- Agricultural Lending
- Consumer/Retail Banking
- Custody
- Healthcare
- Legal
- Non-Profit/University
- Private Banking/Wealth Mgmt
- Securities or Fixed Income Trading
- All Credit Activity
- Corporate Office
- Enterprise Risk
- International/Global Banking
- Life/Health Insurance
- Operational Risk
- Real Estate Lending
- Audit
- Credit Department
- Finance Function
- Investment Banking
- Nonbank/Nonfinancial Institution
- Operations
- Sales and Marketing
- Commercial Banking
- Credit Risk
- Funds Management
- IT
- P&C Insurance
- Securities Lending

If (applicable) Previously, I was an RMA Associate with: \_\_\_\_\_ City: \_\_\_\_\_

**B. Alternate Associate**  Mr.  Ms.  Mrs. Title (e.g., EVP, SVP, etc.): \_\_\_\_\_

Last Name: \_\_\_\_\_ First: \_\_\_\_\_ MI: \_\_\_\_\_ Nickname: \_\_\_\_\_

Business Address (if different than above): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

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- Auditor
- Credit Admin/Department
- Insurance
- Regulator/Examiner
- Securities Lending
- Underwriter/Analyst
- CEO/President
- Credit Policy Officer
- Loan Review/Administration
- Relationship Manager/Lender
- Securities Trader
- University/Librarian
- COO/CFO/Managing Director
- Government Agency
- Nonbank/Nonfinancial
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- Portfolio Management Officer
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**C. Additional Associate**  Mr.  Ms.  Mrs. Title (e.g., EVP, SVP, etc.): \_\_\_\_\_

Last Name: \_\_\_\_\_ First: \_\_\_\_\_ MI: \_\_\_\_\_ Nickname: \_\_\_\_\_

Business Address (if different than above): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_ E-mail: \_\_\_\_\_

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If (applicable) Previously, I was an RMA Associate with: \_\_\_\_\_ City: \_\_\_\_\_

<b>Institutional Dues*</b>							
<b>Assets Minimum</b>		<b>Assets Maximum</b>	<b>Annual Dues**</b>	<b>Assets Minimum</b>		<b>Assets Maximum</b>	<b>Annual Dues**</b>
		under \$50 million	\$580	\$9 billion	and	under \$10 billion	\$16,700
\$50 million	and	under \$75 million	\$700	\$10 billion	and	under \$20 billion	\$18,120
\$75 million	and	under \$100 million	\$830	\$20 billion	and	under \$30 billion	\$20,300
\$100 million	and	under \$150 million	\$1,150	\$30 billion	and	under \$40 billion	\$21,400
\$150 million	and	under \$200 million	\$1,470	\$40 billion	and	under \$60 billion	\$21,900
\$200 million	and	under \$250 million	\$1,750	\$60 billion	and	under \$80 billion	\$22,760
\$250 million	and	under \$300 million	\$2,400	\$80 billion	and	under \$100 billion	\$23,900
\$300 million	and	under \$400 million	\$2,500	\$100 billion	and	under \$150 billion	\$24,500
\$400 million	and	under \$500 million	\$2,570	\$150 billion	and	under \$200 billion	\$26,450
\$500 million	and	under \$600 million	\$3,380	\$200 billion	and	under \$250 billion	\$29,300
\$600 million	and	under \$700 million	\$3,600	\$250 billion	and	under \$300 billion	\$32,260
\$700 million	and	under \$800 million	\$3,950	\$300 billion	and	under \$350 billion	\$35,720
\$800 million	and	under \$900 million	\$4,180	\$350 billion	and	under \$400 billion	\$36,880
\$900 million	and	under \$1 billion	\$4,300	\$400 billion	and	under \$450 billion	\$39,770
\$1 billion	and	under \$1.5 billion	\$4,800	\$450 billion	and	under \$500 billion	\$42,650
\$1.5 billion	and	under \$2 billion	\$5,500	\$500 billion	and	under \$550 billion	\$45,520
\$2 billion	and	under \$2.5 billion	\$7,400	\$550 billion	and	under \$600 billion	\$48,400
\$2.5 billion	and	under \$3 billion	\$8,500	\$600 billion	and	under \$650 billion	\$51,320
\$3 billion	and	under \$4 billion	\$9,800	\$650 billion	and	under \$700 billion	\$54,200
\$4 billion	and	under \$5 billion	\$12,100	\$700 billion	and	under \$800 billion	\$57,600
\$5 billion	and	under \$6 billion	\$13,220	\$800 billion	and	under \$900 billion	\$63,350
\$6 billion	and	under \$7 billion	\$14,700	\$900 billion	and	under \$1 trillion	\$69,150
\$7 billion	and	under \$8 billion	\$15,280	\$1 trillion	and	above	\$75,000
\$8 billion	and	under \$9 billion	\$15,840				

\*The RMA fiscal year is September 1 through August 31. The dues for new institutions joining RMA are prorated in equal twelfths from September 1 through May 14. From May 15, prorated dues for the current fiscal year AND full dues for the upcoming fiscal year will be charged.

\*\*Subject to change. Dues scale is approved in June each year.