

CORPORATE MEMBERSHIP FORM

FOR SETTING PROFESSIONAL STANDARDS IN THE WEALTH MANAGEMENT INDUSTRY

1. Name of Member Organization
2. Name of the Nominated Person
3. Designation of the Nominated Person
4. Address of the Organization

Off. No: _____ ; **Fax:** _____
Mobile: _____ ; **E-mail:** _____

5. Area of Interest for active contribution in different activities of AAFM India Pvt. Ltd.

- a. Contribution by actively participating Advisory Board of AAFM India Pvt. Ltd.
- b. Contribution as Speaker on various Professional Topics
- c. Students Career Awareness Programs
- d. Participation in the Industry Expert Panel of AAFM India Pvt. Ltd.
- e. To undertake research job on various professional topics
- f. Formation of Committees for establishing the industry standards like Academic Committee, Marketing Committee, Industry Integrated Committee, Media Committee, Member Committee, etc.
- g. Any Suggestion/s:

Acknowledgement:

India's wealth management services sector is largely fragmented, which isn't surprising given the industry is still in its early days. The regulatory environment in the Indian wealth management space is evolving, presenting opportunities for established wealth managers to expand their offerings. Establishing trust is a vital component for any successful brand-building exercise in India by appointing qualified advisors.

We acknowledge and understand that towards establishing the standard in the Wealth Management Industry and Building the Wealth Manager of Tomorrow it is very important to contribute by acting as a Corporate Member of AAFM India Pvt. Ltd. to endeavor towards:

1. Promoting CHARTERED WEALTH MANAGER® (CWM®) certification at the organizational level by encouraging the employees to undergo the certification.
2. Recognize the CWM® certification as an eligible advantageous qualification in the financial domain area at our organization.

Authorized Signatory