



California Bankers Association

Affiliate Membership Application

Application Date: ____ / ____ / ____

Organization Name:			
Address:			
City:	State:	Zip:	
Primary Contact:			
Title:			
Phone: ()	Fax: ()		
Email:			
Secondary Contact:			
Title:			
Phone: ()	Fax: ()		
Email:			
Website:			

Affiliate Membership - Reserved for organizations or individuals that provide significant and ongoing services or products to the California banking industry.
(CBA senior management approval required)

I understand that the membership dues are payable upon receipt of the annual invoice unless written notice is submitted to CBA of intent to cancel membership immediately upon receipt of the annual invoice.

Upon approval of affiliate membership it is understood and agreed no endorsement of the affiliate member's products and services are implied or intended.

It is agreed that CBA affiliate membership does not include permission to use the CBA logo.

Dues to the California Bankers Association are not deductible as a charitable contribution for federal income tax purposes, but may be deductible as an ordinary and necessary business expense. A portion of the dues, however, is not deductible as an ordinary and necessary business expense to the extent that the California Bankers Association engages in lobbying. The non-deductible portion of dues for the period January 1 to December 31 (of the current year based on application date) is 30%.

Authorized Signature:	Date:	/	/
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FOR CBA USE ONLY								
Mbr ID:		Dues Amt:	\$	Date Rec'd:	/ /	Approved:	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Batch #:		Check #:		CC Auth #:		<input type="checkbox"/> PAC	<input type="checkbox"/> PAF	



California Bankers Association

Affiliate Membership Application Questionnaire

In order to expedite a timely approval process of your application, please provide the following information and return this form with your membership application:

1. Please submit the following electronically to memberapps@calbankers.com with the subject line Affiliate Member Application – Company BIO, LOGO
 - a. A short (1-2 paragraphs) and a long company bio or summary of your business services or the products you provide to FDIC insured financial institutions.
 - b. A print ready company LOGO in electronic format (JPG, PNG, EPS, etc.)
2. The date your organization began providing services to depository institutions: _____
3. If you have changed the name of your organization in the last year, please indicate previous name(s) under which you have conducted business:

Name: _____
Name: _____

4. Please submit a copy of your organization's last audited financial statement. If not available, please include a statement that describes your company's financial condition.
5. Please list your organization's participation either as a past sponsor or exhibitor at a CBA event or program or skip if there has been no participation.

Year: _____ Event/Program: _____
Year: _____ Event/Program: _____

6. Please include a copy of your privacy policy as it relates to your financial services industry clients and their customers.
7. Please provide a list of California financial institutions served by your organization that will provide a reference to CBA. Please include at least three active client relationships with financial institutions. If there are no California clients, list clients of your organization located outside of California that will provide a reference to CBA.

Reference

Contact: _____
Client: _____
Email: _____

Reference

Contact: _____
Client: _____
Email: _____

Reference

Contact: _____
Client: _____
Email: _____



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8. Please indicate your organization's interest in becoming a sponsor/exhibitor for any of the following programs:

Annual Convention of Bank Officers & Directors	Bank Counsel Seminar
Lenders Conference	Regulatory Compliance Conference
Risk and Cybersecurity Conference	Topical Seminars
Annual Compensation & Benefits Survey	Education Programs and Seminars

9. Please choose one category that best describes your business for purposes of the affiliate member listing on CBA website:

Accounting Receivable Financing	Facility Maintenance	Payment Processing
Auctions	Financial Svcs/Invest. Banking	Real Estate
Bank/Branch Building & Design	Foreclosure Services	Receivership
Bank Card Services	Human Resources	Risk Management
BS/AML	Insurance	Security
Check Program	Law Firm	Staffing
Collection Agencies	Marketing	Trust Related
Compensation/Executive Plans	Mortgage Services	Products & Services
Compliance Consultants	Other (please specify)	Unclaimed Property
Technology Solutions (hardware, software, internet)	_____	
Consulting Firms	_____	
Correspondent Services		
Data Processing/ATM Services		
Disaster Recovery		
Education		

In the event the CBA senior management team determines that your application fails to meet the criteria established for affiliate members, any pre-paid dues will be refunded.

Return questionnaire and requested documents to:

California Bankers Association
Attn: Membership Department
1303 J Street, Suite 600
Sacramento, CA 95814-2939
P. (916) 438-4400
F. (916) 441-5756