

How to Join

Submit each of the following documents:

1. Completed Adjunct Membership application
2. Signed sponsorship by your immediate supervisor, AND
3. Signed sponsorship by a Regular member of BSAS

(If the supervisor sponsorship requirement cannot be met, then a supplementary sponsorship by an additional Regular member of BSAS may be submitted.)

Upon completion, all documents should be sent to:

BSAS
Adjunct Membership
260 Franklin Street, Suite 1540
Boston, MA 02110

You may also fax the completed forms to: (617) 542-6120.

Once the BSAS Board has approved your application for Adjunct Membership, you will be billed the annual dues of \$150.

Thank you, and we look forward to having you as a member of BSAS.

Boston Security Analysts Society

Sponsor Form

Please provide the applicant's qualifications, work experience, and present business responsibilities.
(If needed, please attach a separate piece of paper with full explanation). Please type or print clearly.

Return to: BSAS 260 Franklin Street Boston, MA 02110
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Applicant's First (Given) Name	M.I.	Last (Family) Name	Candidate #
Society Applying To			
Applicant is employed by		Applicant's present title	

Sponsor's Name		Relationship to applicant	
(please check if applicable)			
Sponsor is <input type="checkbox"/> Regular member of the society <input type="checkbox"/> Affiliate member of the Society			
Signature	Title		Date
Firm	Telephone#		
Address			
Are you a CFA® charterholder? If yes, member # _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a member of CFA Institute? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, member # _____	Are you the applicant's supervisor? <input type="checkbox"/> Yes <input type="checkbox"/> No

1. What is the applicant's *primary* full-time, professional occupation? (Please be specific.)

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2. Do the applicant's *primary* duties have direct application to investment valuation and/or the portfolio management process? (Please explain.)

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Professional Competence and Conduct

3. Are you aware of any problems regarding the applicant's professional competence?
If yes, please attach a separate sheet with explanation. Yes No
4. Are you aware of any problems regarding the applicant's character, professional, financial or business conduct?
If yes, please attach a separate sheet with explanation. Yes No

Only Supervisors should complete questions 5-9.

5. Does the applicant construct and rebalance portfolios of assets (e.g., fixed-income and equity securities) for clients? Yes No
6. Does the applicant value and recommend assets (e.g., fixed-income and equity securities) for inclusion in portfolios? Yes No
7. Does the applicant in other ways participate in the investment decision-making process? If so, how? Yes No
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8. Does the applicant spend at least 50% of his/her time engaging in one or a combination of the above activities?
If no, please indicate percentage(s), if possible, in answering Question #1. Yes No

9. Has the applicant accrued at least 36 months in one or a combination of items 5, 6, or 7? Yes No

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