



PORTFOLIO MANAGEMENT ASSOCIATION OF CANADA (PMAC)

APPLICATION FOR AFFILIATE MEMBERSHIP

SECTIONS:

A. FIRM CONTACT INFORMATION

B. AFFILIATE STATUS CRITERIA

C. TERMS & CONDITIONS

Please return completed application via any of the following ways:

- **Email:** info@pmac.org
- **Mail:** PMAC, 1 Toronto Street, Suite 905, Toronto, Ontario, M5C 2V6

Please Note: Payment is not due at time of application. Upon approval of application, an invoice will be issued for the annual fee of \$3,800 + tax, prorated to the closest month.

Your privacy is important to us. PMAC collects, uses or discloses your personal information only in accordance with and for the purposes outlined in the [PMAC Privacy Policy](#).

Affiliate Membership does not - and may not be used to - imply PMAC's endorsement of any firm, products, services, or personnel.

SECTION A – FIRM CONTACT INFORMATION

Firm Contact Information – PLEASE PRINT OR TYPE ALL RESPONSES

Firm Name			Acronym
Mailing Address	Suite Number	City, Province	Postal Code
Telephone Number	Toll-Free Phone Number	Firm Email	Website

In order to ensure that we have the correct individuals for PMAC communications, please identify the applicable individuals listed below for whom you wish to have involved with PMAC. Email addresses are needed to set up access to the PMAC Members-Only area of the website and to be added to distribution lists for PMAC e-Bulletins. **Please note:** by providing the following contact information, you are also consenting on behalf of each of these individuals to the receipt of any commercial electronic messages that PMAC may send from time to time. To change or withdraw this consent, please contact PMAC at info@pmac.org.

Firm Staff Information

Primary Contact to PMAC for official matters and notices

First Name	Last Name	Preferred Name
Title / Position		Email Address
Telephone Number	Address (if different from firm mailing address)	
Public Contact for public listing on PMAC website		☐ Same as Primary

First Name	Last Name	Preferred Name
Title / Position		Email Address
Telephone Number	Address (if different from firm mailing address)	
Sponsorship / Marketing Contact		☐ Same as Primary

First Name	Last Name	Preferred Name
Title / Position		Email Address
Telephone Number	Address (if different from firm mailing address)	

Please Note: There is no limit to the number of firm staff who may receive PMAC Affiliate member benefits and be on the PMAC mailing list.

Please attach supplemental pages if you would like to add additional firm staff.

SECTION B – AFFILIATE STATUS CRITERIA

PMAC Affiliate Membership is available to major suppliers and/or professional advisors to the investment industry, who are considered leaders in their fields. Affiliates may benefit from participation with the Association and whose participation with the Association may be of benefit to PMAC Members.

1. Please specify your firm's connection to the investment industry.

- | | |
|--|---|
| ☐ Accounting Firm | ☐ Insurance |
| ☐ Consultant | ☐ Law Firm |
| ☐ Compliance | ☐ Technology Solution Provider |
| ☐ Custodian | |
| ☐ Other (please specify): | _____ |

2. Please list at least three (3) PMAC Members that are presently clients or customers.

(Please use the following link to view a list of PMAC Members: https://pmac.org/firms/?all_firms=true)

3. How do you hope to participate as an Affiliate and/or utilize your Affiliate Membership?

4. Affiliate Members of PMAC are ideally leaders in their field and/or suppliers whose business is focused on the portfolio management segment of the industry. Please describe how your business is aligned with this criteria.

SECTION C – TERMS & CONDITIONS

Participation in and/or hosting of PMAC events, seminars or conferences is encouraged by Affiliates, but may be limited in certain circumstances, and may be subject to PMAC committee approval.

As an Affiliate of PMAC, you may market your Affiliate Status and/or committee participation with PMAC on your website or in other client marketing materials; however, such marketing activity does not constitute or imply endorsement, sponsorship or recommendation of services by PMAC. It is agreed that PMAC may need to review/approve any use of the PMAC logo or any reference to PMAC in your firm's marketing materials.

It is understood that as part of our service to Members, PMAC may survey Affiliates from time to time.

It is understood that PMAC may limit the number of its Affiliates and Affiliate Status may be refused if we have reached capacity in terms of total affiliates and/or supplier type. PMAC also reserves the right to limit Affiliates' participation on PMAC committees from time to time.

It is understood that the PMAC Board of Directors or Executive Committee may terminate, cancel or temporarily suspend an Affiliate's Status with PMAC if, in its judgement, the Affiliate has violated any material provision of the applicable legislation under which it is registered and/or ceased to meet the conditions for Affiliate Status or for the failure to pay any annual or special fees, dues or assessments.

At the discretion of the Board, if an Affiliate's actions are not in the best interest of the Association, such Status may be terminated.

I confirm that I have read and understood the terms and conditions of PMAC Affiliate Membership:

Name of Authorized Signing Officer

Signature of Authorized Signing Officer

Date

Affiliate Membership Accepted by the Portfolio Management Association of Canada (PMAC):

Signature of PMAC President

Date of Approval