



CAL POLY POMONA  
**FINANCE SOCIETY**  
FMA STUDENT CHAPTER



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## Membership Materials

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## Instructions

- All students must complete [Page 2](#) and [Page 3](#).
- Optional:  
Students who wish to join FMA's National Honor Society (NHS) must also complete [Page 4](#).
- All students must pay annual dues.
  - Dues include Finance Society dues and FMA dues.
  - Dues may be paid in cash or by check made payable to Finance Society.  
(*The Finance Society will issue a check to FMA; members should not write separate checks for Society dues and FMA dues.*)

# FINANCE SOCIETY INCENTIVE PROGRAM

## Types of Members:

### REGULAR MEMBER

Receive:

- A FMA membership and membership card
- A *Careers in Finance* book
- A free membership with the Association for Financial Professionals (AFP)
- FMA National Honor Society members also receive a NHS certificate and pin

### ACTIVE MEMBER

**(30+ points, including at least 10 Attendance Points and 10 Participation/Volunteer Points)**

Receive:

- All Regular Member benefits
- A Finance Society graduation stole
- A reference letter from the Chair of the FRL Department upon graduation

### SUPERIOR MEMBER

**(An Active Member with 15+ Volunteer Points)**

Receive:

- All Regular Member and Active Member benefits
  - A Finance Society Superior Member gold graduation stole
  - Eligibility to attend the annual FMA Leadership Conference\*
- \* Superior Membership status must be obtained at least six weeks prior to conference.

## How to Earn Points:

### ATTENDANCE POINTS

Attend a General Meeting (**2 points**)

### PARTICIPATION POINTS

Make a donation (**0.5 points per dollar donated**)

Attend a Finance Society event (**2 points**)

Bring a friend to a Finance Society event (**1 point**)

Wear your Finance Society shirt to a meeting or event (**1 point**)

Bring a friend to a Finance Society meeting who becomes a member (**5 points**)

Serve as a Finance Society Executive Board member (**10 points**)

### VOLUNTEER POINTS

Bring food, supplies, etc. to a Finance Society event (**2 points**)

Help with set-up or clean up of a Finance Society event (**2 points**)

Participate in a Finance Society fundraiser (**3+ points**, to be determined prior to each fundraiser)

Participate in a Finance Society community service activity (**3+ points**, to be determined prior to each activity)

Points are non-transferable. Point allocations are subject to change. If point allocations change, the Finance Society Executive Board will notify Society members two weeks prior to the effective change date via e-mail, phone, or announcement at a general meeting. Graduating seniors may purchase up to a maximum of six (6) Attendance Points or Participation Points in order to receive their stole. Volunteer points may not be purchased. Society members have the right to view their accumulated points earned to date. For any questions regarding points or membership status, please contact the Finance Society Secretary, Natalie Lam.

# FINANCE SOCIETY APPLICATION

Date: \_\_\_\_\_

Current Quarter: Fall Winter Spring

Name:					
Bronco ID:					
Address:					
City:		State:		Zip:	
Phone:					
Major:					
E-mail:					

I am applying for (please check **only one** box):

**Finance Society + Regular FMA Membership**

- Without *Financial Management* Subscription \$45.00
- With *Financial Management* Subscription \$55.00

**Finance Society + FMA National Honor Society Membership**

- Without *Financial Management* Subscription \$50.00
- With *Financial Management* Subscription \$60.00

For Finance Society Office Use Only				
Officer Name		Date		
Membership Type	<input type="checkbox"/> Regular <input type="checkbox"/> NHS <input type="checkbox"/> Upgrade	Resume	<input type="checkbox"/> Enclosed	
Date Payment Rcvd		Payment Amt		
Payment Type	<input type="checkbox"/> Cash <input type="checkbox"/> Check			
Officer Initials		Treas Initials		
NHS Eligibility	<input type="checkbox"/> Approved <input type="checkbox"/> Not Approved	Checked by		
Comments				
Date Sent to FMA		Officer Initials		



Personal Information (Please Print)

Date: \_\_\_\_\_ College or University: California State Polytechnic University, Pomona

Name: \_\_\_\_\_ Does your school have an FMA chapter? \*  yes  no

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ Grade Level:  fresh.  sop.  jr.  sr.  grad.

Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

\*Initial membership materials are mailed to chapters during the fall and spring semesters.

Membership Type

- 1. Is this a ... (select one)  New Membership  Renewal  Existing Member Upgrading to NHS  Existing Member Upgrading to Professional Membership

- 2. Choose one... One Year Two Years
Regular Student Membership [ ] \$45\* [ ] \$70\*
National Honor Society Membership (faculty advisor signature required in box below) [ ] \$50\* [ ] \$80\*
Existing Member Upgrading to NHS (faculty advisor signature required in box below) [ ] \$5
Existing Member Upgrading to Professional Member [ ] \$45\*\* [ ] \$90\*\*

\* Membership includes a subscription to Financial Management. Student members may elect to waive their subscription to Financial Management. To exercise this option, check here [ ] and deduct \$10 from the one year or \$20 from the two year membership fee.

\*\* Special, one-time discounted rate for students. Standard rate for professional renewal is \$70.

3. Choose Membership Delivery Method

- [ ] Print Delivery OR [ ] Electronic Delivery

Electronic Delivery: Publications (with the exception of Careers in Finance) will be delivered electronically via PDF files and/or email communications. Members residing outside the US who choose Electronic Delivery do not have to pay the additional postage fee.

4. Total Amount Due \$ \_\_\_\_\_ (see if additional fees below apply)

MEMBERSHIPS OUTSIDE THE US: Add \$20.00 to new or renewal membership to cover postage & handling.

FLORIDA RESIDENTS: If you wish to receive the subscription to Financial Management, please add \$0.70 State Sales Tax to your membership.

Payment Options

Check Enclosed (made payable to FMA, must be in US dollars drawn on a US bank)

[ ] MasterCard [ ] Visa [ ] AMEX

[Empty box for Security Code]

Account Number ↑

Expiration Date ↑

Security Code ↑

Signature ↑

National Honor Society (NHS) Requirements

(Chapters may set higher requirements)

Undergraduate (Junior or senior class standing)

- 3.25 Overall GPA OR 3.25 GPA in finance & related coursework
• Completion of a minimum of six (6) hours of finance

Graduate

- 3.50 Overall GPA OR 3.50 GPA in finance & related coursework
• Completion of one-half required coursework

In signing below, I certify that this individual meets all requirements for admission to the FMA National Honor Society

Faculty Advisor

NHS members receive a certificate, lapel pin, and recognition on FMA's website (updated quarterly).

Return to:

Financial Management Association, University of South Florida, College of Business Administration, Suite 3331, 4202 E. Fowler Ave. Tampa, FL 33620
Phone: (813) 974-2084, Fax: (813) 974-3318, E-mail: student@fma.org Website: www.fma.org (click on "students")

# FMA NATIONAL HONOR SOCIETY APPLICATION

Name:		
Bronco ID:		
Phone:		
E-mail:		
GPA:	Overall:	<b>OR Finance Coursework:</b>
Units Completed:		

## Undergraduate Students

- You must be a junior (91 – 135 units) or senior (136 – 180 units) class standing
- You must have successfully completed six hours of finance: FRL300 & FRL301
- You must have a **3.25 overall GPA**

**OR**

- You must have a **3.25 GPA in finance coursework\***  
 \* If you are using this criterion, you must put the grades received for ALL completed courses.

<u>Grade</u>	<u>Grade</u>
____ FRL 300 Managerial Finance I	____ FRL 301 Managerial Finance II
____ FRL 315 Financial Institutions	____ FRL 330 Investment Analysis
____ FRL 331 Financial Derivatives	____ FRL 363 Financial Forecasting
____ FRL 367 Corporate Finance Theory	____ FRL 404 Financial Modeling
____ FRL 420 Financing Small Business	____ FRL 433 Seminar in Portfolio Management
____ FRL 440 Evaluation of Financial Policy	____ FRL 453 Multinational Financial Management
____ FRL 460 Commercial Banking	____ FRL 463 Seminar in Finance

## Graduate Students

- You must have completed one-half required coursework
- You must have a **3.50 overall GPA**

**OR**

- You must have a **3.50 GPA in finance coursework\***

By signing below, I declare that the information contained in this application is true and correct and fulfills the requirements to become a member of the FMA National Honor Society. In the event that such information is found false and the criteria are not satisfied, my membership with the FMA National Honor Society will be disqualified. In addition, I give permission to the Finance Society Faculty Advisor and Executive Board to verify my grades and maintain this knowledge in privacy.

**SIGNATURE** \_\_\_\_\_ **DATE** \_\_\_\_\_

To calculate your GPA, you can go to: <http://www.dsa.csupomona.edu/registrar/grade.asp>