

***Triangle Benefits Forum***  
***Membership Application***

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Firm/Company Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Office Number: \_\_\_\_\_  
Mobile Number: \_\_\_\_\_  
Fax Number: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_  
Your Position: \_\_\_\_\_

Describe your current ERISA/Employee Benefits work experience:  
\_\_\_\_\_  
\_\_\_\_\_

Number of years of ERISA/Employee Benefits experience:  
\_\_\_\_\_

Membership in other related organizations:  
\_\_\_\_\_

Topics of interest, i.e. types of clients served:  
\_\_\_\_\_  
\_\_\_\_\_

How did you hear about TBF?  
\_\_\_\_\_

*E-mail the completed application to the current TBF Treasurer listed below. The TBF Treasurer will forward your application to the TBF Board for membership approval. Membership dues for contributing members (company hosts or speaks at least one time/year or recruits one new member) - \$25.00 and for non-contributing members - \$50.00 will be due upon membership approval and September 30 each year thereafter. If you recruit one new member during the current year, the reduction will apply to the next year.*

J. Mark Livingston, CPA, CPIM, Treasurer  
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Raleigh, NC 27607  
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**The Triangle Benefits Forum maintains a non-solicitation policy. Violation of this policy may result in loss of membership.**

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**FOR OFFICE USE ONLY**

E-mailed to Treasurer for Billing    E-mailed to COO for Adding to Website    Added to E-mail Distribution List