



Membership Application

TAX EXECUTIVES INSTITUTE • 1200 G Street NW, Suite 300 • Washington, D.C. 20005 • P: 202.638.5601 F: 202.638.5607

Note: Applying online at www.tei.org will expedite the application process.

Tax Executives Institute, founded in 1944, is the preeminent international association of business tax executives responsible for the tax affairs of their employees. The Institute's 7,000 members in 54 chapters represent more than 3,200 of the largest companies in the United States, Canada, Europe, and Asia. TEI members are accountants, lawyers, and other corporate and business employees who are responsible for the tax affairs of their employers in an executive, administrative, or managerial capacity. Attorneys, accountants, and other consultants in private practice are not eligible to join.

With organizational values and goals that include integrity, effectiveness and efficiency, and dedication to improving the tax system, TEI advances its mission of serving members and their employers through education, networking, and advocacy.

Benefits of Membership.

For both the seasoned and the aspiring tax executive, TEI offers the following benefits:

- **Networking.** Chapter-level networking is TEI's No. 1 member benefit. It's a great way to stay professionally plugged in!
- **Continuing Education.** Meet your CE needs and maintain your professional edge through more than 600 affordable programs, most offered through local TEI chapters.
- **The Tax Executive.** Keep up to date with TEI's bimonthly magazine covering timely issues of tax policy, administration and management, TEI advocacy initiatives, and more.
- **Online Forums.** Get answers to your questions and share your expertise! Log into www.tei.org and check out our new ten issue-based Forums.
- **Member Discounts.** Enjoy significant discounts on Thomson Reuters Tax & Accounting products and products marketed in Canada by Carswell.
- **TEI Roster.** This annual publication contains contact information for all TEI members, chapters, committees and Institute leadership.
- **Career Services.** Make your move! Find or post a job online at www.tei.org.
- **Member Access.** Log into www.tei.org and renew your membership, update your member profile, register for a conference, find a colleague, and keep up with changing tax laws.
- **Timely analyses** of proposed legislation, regulations, and other administrative pronouncements.

Applicant Information (please print) *See Page 4 for Application Procedures and Membership Eligibility Guidelines.*

Applicant's Name _____

Title _____

Nickname _____ Date of birth _____ Male _____ Female _____

Name of company _____

Business Address _____

City _____ State/Province _____ Zip/Postal Code _____

Country _____

Business phone _____ Fax _____

Email Address _____ Company website _____

Home Address (optional) _____

City _____ State/Province _____ Zip/Postal Code _____

Personal phone _____ Personal Email _____

_____ Please use my home address for TEI mail.

Are you the chief tax officer for your company? Yes _____ No _____

If No, give name and title of chief tax officer _____

Are you a CPA? _____ Attorney? _____

Total years of relevant tax experience _____

Do you have government tax experience? Please specify country, state/province _____

Nature of current business _____

Date started with current employer (month/year) _____

Nature of duties _____

Portion of time (in years or percentage) devoted to tax matters with employer _____

Note: You must have at least five years of corporate tax experience (see Membership Eligibility Guidelines.) **Complete previous employment as necessary.**

Previous Tax-Related Employment (use additional sheet if necessary):

Name of Employer _____ **Dates of employment** _____

Location _____

Title _____

Nature of duties _____

Portion of time (in years or percentage) devoted to tax matters _____

Name of Employer _____ **Dates of employment** _____

Location _____

Title _____

Nature of duties _____

Portion of time (in years or percentage) devoted to tax matters _____

Education

	Name and Location of School	Year of Graduation/ Separation	Degree
College	_____	_____	_____
Post-Graduate	_____	_____	_____
	_____	_____	_____
Other	_____	_____	_____

Check the areas of taxation in which you spend the largest portion of your time (select **only one** item from each section):

Section 1

- _____ Head of the Department
- _____ U.S. Federal
- _____ U.S. International
- _____ Canadian Income
- _____ State & Local
- _____ Other _____

Section 2

- _____ Asian
- _____ European
- _____ Canadian GST
- _____ Mgt. of Tax Function
- _____ Income/Franchise
- _____ Property
- _____ Sales/Use
- _____ Compliance
- _____ Research/Planning
- _____ Policy/Legislative
- _____ Mergers & Acquisitions
- _____ Employee Benefits
- _____ Payroll
- _____ Tax Systems (MIS)
- _____ Other _____
- _____ VAT/GST
- _____ Customs/Excise
- _____ Transfer Pricing
- _____ Tax Accounting
- _____ Expatriate Tax

Check the **one** primary industry grouping which **best** describes your company:

- | | | |
|--|--|---|
| 1. <input type="checkbox"/> Aerospace & Gov't Contracting | 8. <input type="checkbox"/> Healthcare | 15. <input type="checkbox"/> Restaurant, Hotel,
and Franchise Operations |
| 2. <input type="checkbox"/> Automotive Suppliers/
Machinery & Allied Products | 9. <input type="checkbox"/> Insurance | 16. <input type="checkbox"/> Retail Trade |
| 3. <input type="checkbox"/> Chemicals | 10. <input type="checkbox"/> Media | 17. <input type="checkbox"/> Telecommunications |
| 4. <input type="checkbox"/> Electronics | 11. <input type="checkbox"/> Mining | 18. <input type="checkbox"/> Forest Products |
| 5. <input type="checkbox"/> Equipment Leasing/Rentals | 12. <input type="checkbox"/> Petroleum | 19. <input type="checkbox"/> Transportation |
| 6. <input type="checkbox"/> Financial Institutions | 13. <input type="checkbox"/> Pharmaceuticals | 20. <input type="checkbox"/> Utilities |
| 7. <input type="checkbox"/> Food & Beverage | 14. <input type="checkbox"/> Primary Metals & Other
Basic Manufacturing | 21. <input type="checkbox"/> All Others – Manufacturing |
| | | 22. <input type="checkbox"/> All Others – Non-Manufacturing |

To which of the following IRS Large Business and International Division industry groups is your company assigned?

- | | |
|--|---|
| <input type="checkbox"/> Retailers, Food, Pharmaceuticals & Healthcare | <input type="checkbox"/> Heavy Manufacturing & Transportation |
| <input type="checkbox"/> Financial Services | <input type="checkbox"/> Communications, Technology & Media |
| <input type="checkbox"/> Natural Resources & Construction | <input type="checkbox"/> Don't Know/Not Applicable |

I am applying for membership in the TEI chapter marked below and agree to comply with the requirements of the By-Laws, Standards of Conduct, and all regulations adopted by the Board of Directors.

- | | | | |
|---|--------------------------------------|--|--|
| <input type="checkbox"/> Arizona | <input type="checkbox"/> Detroit | <input type="checkbox"/> Nashville | <input type="checkbox"/> Salt Lake City |
| <input type="checkbox"/> Asia | <input type="checkbox"/> EMEA | <input type="checkbox"/> Nebraska | <input type="checkbox"/> San Diego |
| <input type="checkbox"/> Atlanta | <input type="checkbox"/> Florida | <input type="checkbox"/> New England | <input type="checkbox"/> San Francisco |
| <input type="checkbox"/> Austin | <input type="checkbox"/> Fort Worth | <input type="checkbox"/> New Jersey | <input type="checkbox"/> Santa Clara Valley |
| <input type="checkbox"/> Baltimore-Washington | <input type="checkbox"/> Harrisburg | <input type="checkbox"/> New Orleans | <input type="checkbox"/> Seattle |
| <input type="checkbox"/> Buffalo-Niagara | <input type="checkbox"/> Hawaii | <input type="checkbox"/> New York | <input type="checkbox"/> Syracuse |
| <input type="checkbox"/> Calgary | <input type="checkbox"/> Houston | <input type="checkbox"/> Northeast Wisconsin | <input type="checkbox"/> Toronto |
| <input type="checkbox"/> Carolinas | <input type="checkbox"/> Indiana | <input type="checkbox"/> Oklahoma | <input type="checkbox"/> Vancouver |
| <input type="checkbox"/> Chicago | <input type="checkbox"/> Iowa | <input type="checkbox"/> Orange County | <input type="checkbox"/> Virginia |
| <input type="checkbox"/> Cincinnati | <input type="checkbox"/> Kansas City | <input type="checkbox"/> Philadelphia | <input type="checkbox"/> Westchester-Fairfield |
| <input type="checkbox"/> Cleveland | <input type="checkbox"/> Kentucky | <input type="checkbox"/> Pittsburgh | <input type="checkbox"/> Western Michigan |
| <input type="checkbox"/> Connecticut Valley | <input type="checkbox"/> Los Angeles | <input type="checkbox"/> Portland | <input type="checkbox"/> Wisconsin |
| <input type="checkbox"/> Dallas | <input type="checkbox"/> Minnesota | <input type="checkbox"/> Rochester | |
| <input type="checkbox"/> Denver | <input type="checkbox"/> Montreal | <input type="checkbox"/> St. Louis | |

Need help identifying your Chapter? Email us at memberinfo@tei.org or call 202.638.5601.

By joining TEI, the member agrees that TEI may publish contact information electronically or in print. The member also agrees that TEI may communicate with the member via fax, email, or other means. If you wish to opt out of either of these services, please check below.

By marking this area, I direct TEI not to publish any information about me in TEI's print or online membership directory.

By marking this area, I direct TEI not to communicate with me by fax or commercial email.

Name of Applicant (print) _____

Amount \$450 (\$225 Annual Dues, \$225 Initiation Fee) - (U.S. funds drawn on a U.S. bank)

For info on payment by wire transfer, email memberinfo@tei.org.

Method of Payment Check or money order made payable to Tax Executives Institute (enclosed)

VISA MasterCard American Express Discover Diners Club

Card No. _____ Expiration Date _____

Cardholder Name (print) _____

Signature _____

Phone _____ Fax _____ Email _____

I am interested in joining an Institute level committee. Please contact me.

1. Send completed Membership Application and payment to: Tax Executives Institute, P.O. Box 9407, Uniondale, NY 11555-9407. Applications with credit card information may be faxed to 202.638.5607. You may also apply for membership online at www.tei.org.
2. A first-year payment of \$450 (\$225 initiation fee, \$225 annual dues in U.S. Funds) must be received before application is processed. Checks should be made payable to Tax Executives Institute.

For information on wire transfers, please email memberinfo@tei.org.
3. The application will be reviewed by the Institute's Membership Committee. Processing should take no more than two weeks once all relevant information is submitted.
4. Once the application is approved you will be informed by email and receive a new member packet. If an application is not approved, you will be informed of the reasons as well as the Institute's reconsideration procedures.
5. Questions about membership eligibility and the application process should be directed to TEI's membership coordinator at 202.638.5601 or memberinfo@tei.org.

Membership Eligibility Guidelines (Approved by the Institute Board of Directors)

1. QUALIFYING EMPLOYMENT

Membership is open to full-time corporate employees whose work consists principally of administering taxes on an executive or management level and who meet certain minimum experience requirements. Individuals engaged in public tax practice are not eligible.

2. MINIMUM CORPORATE TAX EXPERIENCE

Applicant must have a minimum of five years' corporate tax experience or its equivalent and hold a position in tax management operations of a profit-oriented business.

The five years of corporate tax experience means a minimum of five years' full-time employment or its equivalent in a department charged with the responsibility of administering the taxation of a publicly or privately owned profit-oriented corporation or partnership that (except for Crown Corporations) is required to file annual income tax returns.

3. EQUIVALENT EXPERIENCE

Employment in any of the following areas may be counted toward the minimum five years' tax experience requirement:

- Employment in a company based on the percentage of time devoted to tax affairs (including customs activities.)

- Employment in a private law firm as tax counsel whose duties involved advising clients on business tax matters.
- Employment in the tax department of a public accounting firm whose duties involved advising clients on business tax matters.
- Employment with the revenue department of a national or other government where principal duties involved the administration of taxes imposed on business entities.
- Employment in a college or university, teaching business tax in a professorial or instructor capacity.

General accounting, auditing, or legal practice (outside the tax field), general government administration, legal or accounting clerkship, or student/work programs generally will **not** be counted in arriving at the prescribed requisite of five years' tax experience.

On an exception basis, managerial experience may be counted **in combination with tax experience**. Any applicant requesting this exception should submit a detailed explanation along with the application. Questions should be directed to TEI's membership coordinator.



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