

# ACCESS GRANTED



## MEMBERSHIP APPLICATION

*Note: Applying online at [www.tei.org](http://www.tei.org) will expedite the application process.*

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

#### 1. QUALIFYING EMPLOYMENT

Membership is open to full-time employees who currently hold a tax position in a profit-oriented business. 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.

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.

Equivalent experience includes employment as a tax advisor for a private law or public accounting firm, as well as employment in the revenue department of a government where the principal duty involved the administration of taxes imposed on business entities.

For more details, <https://tei.org/membership/become-member>

### General Information (Please print or email)

APPLICANT'S NAME

NICKNAME

MALE

FEMALE

ARE YOU A CPA?

ATTORNEY?

JOB TITLE

Are you the chief tax officer for your company?

Yes

No

NAME OF COMPANY

NATURE OF BUSINESS

BUSINESS ADDRESS 1

BUSINESS ADDRESS 2

CITY

STATE/PROVINCE

ZIP/POSTAL CODE

COUNTRY

BUSINESS PHONE

EMAIL ADDRESS

I wish to affiliate with the following Chapter: \_\_\_\_\_

I am unsure of my chapter. Please call me.

Please use my personal contact information for TEI communications.

PERSONAL ADDRESS (OPTIONAL)

CITY

STATE/PROVINCE

ZIP/POSTAL CODE

COUNTRY

PERSONAL PHONE

PERSONAL EMAIL

### Experience

TOTAL YEARS OF RELEVANT TAX EXPERIENCE

DATE STARTED WITH CURRENT EMPLOYER (MONTH/YEAR)

PERCENTAGE OF TIME CURRENTLY DEVOTED TO TAX MATTERS

Please check all areas that describe your significant role(s)/function(s):

Head of Tax

Director/Manager

Research/Planning

Transactional/M&A

Compliance

Audit/Controversy

Policy/Legislative

Transfer Pricing

Financial Reporting/Tax Accounting

Other:



Please check all areas of taxation in which you spend a significant amount of time or that are areas of interest:

- |                      |                                 |                          |
|----------------------|---------------------------------|--------------------------|
| U.S. Federal         | U.S. International              | Corporate Tax Management |
| Canadian Direct      | European Direct                 | Tax Technology           |
| Latin America        | Asia                            | Africa                   |
| U.S. State and Local | U.S. Employee Benefits/ Payroll | Other:                   |
| Canadian Indirect    | European Indirect               |                          |
| Oceania              | Middle East                     |                          |

### PREVIOUS TAX-RELATED EMPLOYMENT (use additional sheet if necessary):

(Note: If you have been with your current employer less than 5 years, please complete this section to document the 5 year eligibility requirement.)

NAME OF EMPLOYER	DATES OF EMPLOYMENT
LOCATION	
JOB TITLE	
AREAS OF RESPONSIBILITY	
PERCENTAGE OF TIME DEVOTED TO TAX MATTERS	

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 email.

## Payment

**AMOUNT \$225** (~~\$225 Annual Dues, \$225 Initiation Fee~~ **WAIVED**) – (U.S. funds drawn on a U.S. bank).

For info on payment by wire transfer, email [memberinfo@tei.org](mailto: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 \_\_\_\_\_ I, the applicant for this membership application, warrant the truthfulness of the information provided in this application. I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms of Acceptance.

## Application Procedures

- Send completed Membership Application and payment to: Tax\_Exec; Lockbox 9407 PO Box 70280; Philadelphia, PA 19176-0280. Applications with credit card information may be faxed to 202.638.5607. You may also apply for membership online at [www.tei.org](http://www.tei.org).
- A first-year payment of \$225 (~~\$225 initiation fee,~~ **WAIVED** \$225 annual dues in U.S. Funds) must be received before application is processed. Checks should be made payable to Tax Executives Institute.
- Questions about membership eligibility and the application process should be directed to TEI's membership coordinator at 202.638.5601 or [memberinfo@tei.org](mailto:memberinfo@tei.org).
- 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.

For information on wire transfers, please email [memberinfo@tei.org](mailto:memberinfo@tei.org).

