

# Contact Us

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Association for Management  
Information in Financial Services

Corporate and Individual Membership Applications Inside

2007

# Members Guide

Corporate and Individual Membership Application Inside

\* EDUCATION & TRAINING

\* NETWORKING

\* RESEARCH

\* JOB BANK

\* PUBLICATIONS



Association for Management  
Information in Financial Services

## Memo to Members



**Our tradition of providing superb education and research continues in 2007, our 27th year.** For over 25 years, AMIFS has served over 6000 members, educated over 10,000 profitability and performance management professionals, and awarded hundreds of thousands of CPE credits. We continue to invest in new educational offerings, add new research, and enhance the value of membership.

Our plans for 2007 include:

- ✓ Launching our Certified Profitability Professional Program.
- ✓ Introduce three new workshops including:
  - Performance Measurement for the Advanced Practitioner
  - Advanced FTP (New and Enhanced)
  - Profitability Triad (New and Enhanced)
- ✓ We will introduce several new webinars during the year.
- ✓ Continue to enhance the feature and functionality of the AMIFS website.

We are blessed to have so many volunteers assisting AMIFS with the development and management of these programs. In addition to our Board, we have several committees of volunteers including the Research Committee, Workshop Committee, and the Conference Committee. As a group of volunteers we welcome your opinions on how we can improve. Please feel free to email any thoughts or ideas to [ami@amifs.org](mailto:ami@amifs.org).

**We look forward to another great year and we hope to see each of you at an AMIFS event soon!**

**The AMIFS Board**

## Corporate Membership Application

(continued from page 12)

### Type of Company

- Bank
- Savings Bank/Savings & Loan
- Credit Union
- Thrift
- Consulting
- Software
- Other \_\_\_\_\_

### Asset Size

- Under \$1 Billion
- \$1 Billion – \$20 Billion
- \$20 Billion – \$50 Billion
- \$50 Billion – \$100 Billion
- Over \$100 Billion

Number of years experience in management information in financial services \_\_\_\_\_

### Additional Corporate Members

For additional corporate members, please copy and complete this form for each additional member. This form can be downloaded from the website at [www.amifs.org](http://www.amifs.org). Additionally, please submit a separate list of corporate members including:

- ◆ Name, Title and Mailing Address
- ◆ Phone, Fax and E-mail address

### PAYMENT OPTIONS

- Payment enclosed • Check made payable to AMIFS for US \$1,200
- Charge to credit card     VISA     Mastercard     AMEX
- Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_
- Signature \_\_\_\_\_



I declare that all information contained on this application is true and correct. I agree to abide by the decision of the Board of Directors as to the disposition of this application. I agree to be governed by and comply with the Bylaws of the Association.

Signed: \_\_\_\_\_

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

# Corporate Membership Application

## NOTE:

- ◆ Copy and complete application for each corporate member.
- ◆ Membership is on a calendar year.
- ◆ Please print and complete both sides of form.
- ◆ Membership dues are not a charitable expense but may be deducted as a business expense.
- ◆ If you have any questions, contact us at (770) 444-3557 or ami@amifs.org.



Name and Title		
Department	Internal Mail Code	
Address 1		
Address 2		
City	State	Zip
Country (if other than U.S.)		
Telephone	Fax	
Email		
Corporate Name		
Corporate Password		

**Corporate Members should complete and attach this same application for each additional member and include with single payment for \$1,200**

APPLICATION	MAIL	FAX	WEBSITE
	Mail completed form with payment to: AMIFs 3895 Fairfax Court Atlanta, Georgia 30339	Fax completed form and credit card information to: <b>770-444-9084</b>	Complete online application at <b>www.amifs.org</b>

# Vision

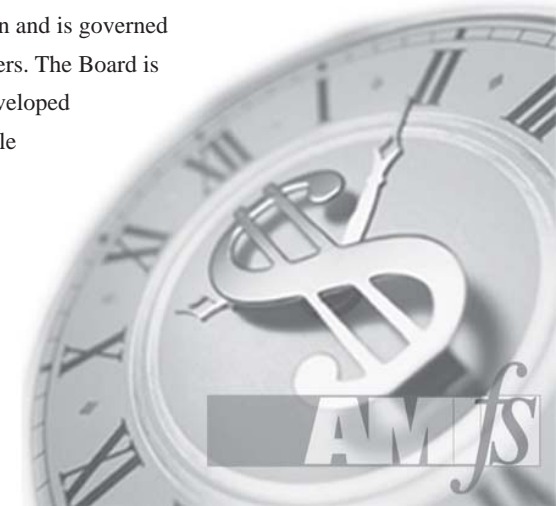
## ABOUT AMIFs

The Association for Management Information in Financial Services (AMIFs) is the preeminent organization for management information professionals in the financial services industry. Founded in 1980, AMIFs has become the premier management accounting organization, and counts among its member's individuals and companies that set policies and advance the concepts of management information at major financial institutions world-wide.

With a membership roster that includes policy makers at leading financial institutions, AMIFs provides a unique opportunity for financial services professionals to share their knowledge and experience. This exchange of ideas produces innovative, real-world solutions that contribute to the professional growth and personal advancement of the Association's members, as well as to the success of the organizations they represent.

Although AMIFs deals with a wide range of topics, its primary focus is on performance measurement related topics such as customer, account, organizational and product profitability, activity based costing, funds transfer pricing, asset/liability management, and related earnings enhancement programs. Through peer consulting and educational programs, members update their knowledge of the latest product developments; trends and management techniques, while keeping abreast of emerging best practice standards.

AMIFs is a non-profit 501c6 organization and is governed by an elected Board of volunteer members. The Board is governed by By-laws that have been developed and modified over the years and available for member review at any time.



# AMIfs Mission



## ◆ Leadership

Develop opportunities for members to advance the profession by participating in the development and presentation of association education, training, and research offerings and coordinating the activities for our members.

## ◆ Education & Training

Provide professional development opportunities for industry practitioners through annual conferences, hands-on workshops, and frequent web based training programs.

## ◆ Research

Identify and coordinate research activities that support the goals of the organization and advance the profession.

## ◆ Networking

Provide opportunities for members to interact and share experience, knowledge, and insights through educational and training events as well as member bulletin boards on the AMIfs website.

## ◆ Other Member Services

Provide related services that add value to the professional education of members as well as advance the cause of our profession.

## ◆ Infrastructure

Establish and maintain an organizational structure designed to accomplish the Association's mission through ongoing involvement of industry professionals.

# INDIVIDUAL MEMBERSHIP APPLICATION

(continued from page 10)

### Type of Company

- Bank
- Savings Bank/Savings & Loan
- Credit Union
- Thrift
- Consulting
- Software
- Other \_\_\_\_\_

### Asset Size

- Under \$1 Billion
- \$1 Billion – \$20 Billion
- \$20 Billion – \$50 Billion
- \$50 Billion – \$100 Billion
- Over \$100 Billion

Number of years experience in management information in financial services \_\_\_\_\_



### Check made payable to AMIfs for US \$350

<b>PAYMENT OPTIONS</b>	<input type="checkbox"/> Payment enclosed
	<input type="checkbox"/> Charge to credit card <input type="checkbox"/> VISA <input type="checkbox"/> Mastercard <input type="checkbox"/> AMEX
	Card # _____ Exp. Date _____
	Signature _____



I declare that all information contained on this application is true and correct. I agree to abide by the decision of the Board of Directors as to the disposition of this application. I agree to be governed by and comply with the Bylaws of the Association.

Signed: \_\_\_\_\_

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

# Individual Membership Application

## NOTE:



- ◆ Membership is on a calendar year.
- ◆ Please print and complete both sides of form.
- ◆ Membership dues are not a charitable expense but may be deducted as a business expense.
- ◆ If you have any questions, contact us at (770) 444-3557 or ami@amifs.org.

Name and Title		
Department	Internal Mail Code	
Address 1		
Address 2		
City	State	Zip
Country (if other than U.S.)		
Telephone	Fax	
Email		

- Check here & complete information below if you would like AMIFs information sent to your home instead of your office.

Address 1		
Address 2		
City	State	Zip
Country (if other than U.S.)		
Email	Fax	

APPLICATION	MAIL	FAX	WEBSITE
	Mail completed form with payment to: AMIFs 3895 Fairfax Court Atlanta, Georgia 30339	Fax completed form and credit card information to: <b>770-444-9084</b>	Complete online application at <b>www.amifs.org</b>

# Professional Education

## ANNUAL CONFERENCE

For twenty six years, AMIFs has hosted an annual conference offering our members an opportunity to gather together to discuss current events, learn from success stories in the industry, view current technologies and solutions, and network with their peers. The event offers a superior educational experience to the financial services industry performance measurement professional and has long served as our annual signature event. We strive to keep AMIFs at the leading edge of education, by enticing the most experienced and professional speakers to address our audience, present intriguing approaches and solutions, and discuss relevant topics.

This three-day event provides upwards of 18 concurrent sessions and several general sessions as well as a large expo area to view the latest vendor technologies and solutions. Pre-conference workshops are also offered on key core topics allowing for a more intense discussion and training session among attendees.

This Annual Conference is widely considered by senior managers to be the financial services industry's most important annual event. The Annual Conference is open to all. AMIFs members receive preferred pricing. Full details, session descriptions and registration are on the AMIFs website under Education.

As with all AMIFs educational offerings, participation qualifies for CPE and credit towards the AMIFs Certificate program described in this Membership Guide.





## WORKSHOPS AND WEB TELECONFERENCES

Several workshops are offered throughout the year on all fundamental topics and issues relevant to performance measurement professionals. These two-day courses are offered on various topics at the beginner, intermediate and senior practitioner level. AMI*fs* has been offering workshops for over twenty years and has collected an excellent database of best practices, industry solutions, and knowledgeable speakers.

Workshop topics change each year and are offered throughout the country. The intent of the Educational Committees is to offer fundamental courses in Funds Transfer Pricing, Activity Based Costing, and Customer, Product, and Organizational Profitability each year. These courses may change slightly and may be offered to more advanced users as the demand dictates.

Web Teleconferences (also known as webinars) offer participants the benefits of web based training on specific topics without the expense of traveling or the time required to travel. In addition to learning about specific topics from knowledgeable speakers, participants have the opportunity to ask questions, vote in quick online industry surveys, and hear from other organizations. These two-hour sessions are packed with information that allows the whole staff to learn at the fraction of the cost of traditional training.

## INSTITUTE

The AMI*fs* Institute is a comprehensive weeklong session covering all major topics related to performance measurement and profitability analysis. This course includes hands-on training, case studies, group activities, and many examples from real situations.

The knowledgeable speakers have organized the material logically to leverage the flow of the construction of income statements and performance reports. This structured course utilizes in depth case studies and sample data to illustrate the concepts learned in class.

This course does not require advance knowledge or preparation and is designed to serve as an integral part of any core-training program for the performance measurement professional. The university setting serves the course well in promoting a team environment for working and learning and assists with the hands-on nature of this course.

## CPE

All AMI*fs* educational offerings including participation in the Annual Conference, Workshops, The AMI*fs* Institute and Web Teleconferences qualify for CPE credit. CPE credit hours are awarded based on a 50-minute "contact hour;" the CPE value of each program is noted in the announcement brochure. Authors of articles and research papers and speakers qualify for additional CPE as defined by NASBA.

AMI*fs* is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: [www.nasba.org](http://www.nasba.org).



## SPONSORSHIPS

AMI*fs* offers professional service and product companies the opportunity to sponsor education events and to become more involved in the continuing education of our members. Through the support of both our members and vendors. AMI*fs* has become the leader in developing and advancing the profession of management information for the financial services industry. Now as a part of our Sponsorship Program, we believe we can offer high quality, more frequent, and more tailored education opportunities for our members while providing greater visibility to our sponsors.

AMI*fs* has developed a sponsorship model that will allow a vendor to sponsor an educational event with AMI*fs* for little or no expense, and reap the benefits of market visibility with the AMI*fs* membership. Several options for sponsoring events allow firms of all sizes and models to participate. By working together in advancing our profession, we believe the sponsorship program provides a win-win solution and helps AMI*fs* continue to be the preeminent organization for management information in the financial services industry.

While we maintain control of education content and quality, we work with our sponsors in selecting knowledgeable speakers and leveraging their training facilities.



**PREVIOUS SPONSORS**

**ALG**  
SOFTWARE

**AcornSystems**  
Enterprise Performance System

**THE KAFAFIAN GROUP**  
INC.  
...helping banks perform better™

**SUNGARD**  
TRADING AND RISK SYSTEMS

**McGuire**  
Performance Solutions  
INC.



## WEBSITE

Membership provides access to member only features on the AMI*fs* website. These features are updated daily and provide full access to publications, research, and educational offerings.



Our QuickPoll industry survey allows members to benefit from the insights gained from quick and relevant industry questions and answers. Members answer four short questions by selecting an appropriate response. After voting, the results to date are displayed for instant evaluation.

The Member Forum section of the website allows members to pose and respond to questions in 36 performance measurement categories. Other members that have elected to participate in the Peer Consulting program are then notified of the question and are asked to reply. This successful networking method leverages the internet and website to provide members with a forum for quick industry feedback on pressing issues.

Complete member and vendor directories are available on-line to members only. These directories provide contact and background information to further promote networking among our professionals. Searches can be executed to locate members with certain skill sets, asset size, and location. Only Corporate Members are allowed to be listed in the Vendor Directory.

These benefits as well as the many other benefits highlighted in this guide are available on the website including the Job Bank, Journal of Performance Management, Bulletins, Educational calendar, one click event registration, and more.

## JOB BANK

AMI*fs*, in keeping with its goal to offer its members opportunities for personal and professional growth, maintains a Job Bank for financial professionals seeking job opportunities, Hiring managers, HR departments, and executive recruiters are encouraged to review the AMI*fs* Job Bank when they seek experienced, proven candidates to fill a position or have positions to fill.

Postings occur frequently and members are notified of each new posting via email. This notification service benefits both organizations looking for skilled professionals as well as those seeking positions.

Additionally, members can post their personal resumes on the website and present their expertise along with suggested position desired. Analysts with a few years of experience to Senior Executives with significant expertise in the field can leverage this tool for personal career advancement.

Posting of a job opportunity is open to any firm. There is a one-time fee of \$250 US for each new position. Candidates seeking opportunities must be active AMI*fs* members to search through these listings. Candidates posting a resume must also be active AMI*fs* members. All Job Bank submissions must be completed on-line and verification of eligibility will be conducted prior to activation. All open positions and resumes will be active for 6 months or until filled, whichever comes first.

## NETWORKING

Networking with peers has been one of the most valued benefits of AMI*fs* for many years. Surveys taken of our members have proven that this membership organization and the stability and continuity of its membership have provided excellent opportunities for the building of professional relationships.

Networking is core to our mission. Each of our educational events offers members and non-members great opportunities to participate in open discussions, panel discussions and general networking.

This networking is extended on the website through open member forums and peer consulting exchanges. The Member Forum allows for the exchange of questions and answers around 36 performance measurement topics. Members can also search for specific expertise from other members through online member directory search capabilities.

Membership is our key to fostering networking and providing our professionals with a forum and environment for peer contact.



## CERTIFICATE PROGRAM

As a professional organization, AMI*fs* is committed to providing its members and patrons with educational programs of the highest caliber. While AMI*fs* Level 1 and Level 2 recognition is open only to AMI*fs* members, registering in this program also provides members and patrons with official verification of contact hours accumulated for CPA and CMA continuing education credits.

To accumulate credits, individuals must sign the attendance sheet that is available at each education session. Credit will only be given to those who sign next to their name during the event. A Certificate of Completion is sent to individuals who sign the attendance sheet at each program.

CPE credits are awarded based on a 50-minute "contact hour". The CPE value of each program is noted in the announcement brochure. No partial contact hours may be awarded.

### AMI*fs* Level 1 Certification

AMI*fs* members must accumulate 60 CPE credits from attendance at AMI*fs* educational events.

### AMI*fs* Level 2 Certification

AMI*fs* members must accumulate an additional 45 contact hours at AMI*fs* education events, plus complete two of the following three requirements:

- Teach at an AMI*fs* workshop
- Speak at an AMI*fs* conference
- Publish an article in the AMI*fs* Journal

If members fulfill the above requirements by speaking, they must speak on two different topics.

This certification program is in addition to our Certified Profitability Professional designation.

## CERTIFIED PROFITABILITY PROFESSIONAL

### BENEFITS:

The Certified Profitability Professional designation demonstrates extensive knowledge of management accounting (MA) within the financial services industry. Earning the CPP certification establishes a level of proficiency on complex profitability measurement topics that senior management demands of their staff. To maintain the designation, CPP holders are required to keep current with changes in both the industry and the discipline. It assures current and future employers that the holder has the necessary education and experience for successful performance.

### CPP REQUIREMENTS:

To earn a new CPP designation, candidates are required to:

- Be a member in good standing with AMI*fs*
- Successfully pass the CPP exam
- Adhere to the AMI*fs* Code of Professional Ethics
- Submit evidence of three (3) years work experience in management information in financial services through a letter of recommendation from your current employer
- Agree to comply with a continuing education policy of 90 hours of qualifying CPE activity within a 3 year certification period. Qualifying activities include:
  - ✓ AMI*fs* Institute
  - ✓ NASBA Approved Conferences and Seminars/Workshops
  - ✓ Self-study programs (maximum of 15 hours)
  - ✓ In-house training programs (maximum of 20 hours)
  - ✓ College or University courses
  - ✓ Author published Management Accounting research or other articles (30 hours)

There will be a one-time allowance to grant current AMI<sup>fs</sup> members in good standing to the CPP certification under these conditions:

- Submit evidence of at least ten (10) years of work experience in management information in financial services (letter of recommendation)
- Be a member in good standing with AMI<sup>fs</sup>
- Adhere to the AMI<sup>fs</sup> Code of Professional Ethics
- Received an AMI<sup>fs</sup> Level 2 Certification

### **Renewal Requirements:**

Once certification is attained, the AMI<sup>fs</sup> annual membership fee covers the CPP renewal fee. Should you not renew your AMI<sup>fs</sup> membership, you will be billed \$100 annually to maintain your CPP certification.

### **CPP Examination:**

The Exam is objective and delivered on-line through a timed internet testing facility. Topics covered in the test are covered in their entirety in the **AMI<sup>fs</sup> Institute** curriculum offered once a year.

- The exam is a 200 question multiple choice test. The purpose of the exam is to test the applicant's knowledge and application of Management Information principles and practices. Scoring 140 correct of the 200 questions is a passing score.

Content Areas of the 200 Multiple Choice Exam include:

1. Asset Liability Management (ALM)
2. Capital Assignment (CA)
3. Funds Transfer Pricing (FTP)
4. Process, Activity and Customer Costing (PAC)
5. Profitability Measurements (PM)
6. Data Aggregation (DA)

- CPP Examination Fees are – \$295
- Fees include the ability to re-test every 3 months for 18 months – if necessary.

### **CPP Code of Ethics:**

A Code of Ethics sets forth a discipline of conduct in support of the demanding standards of a profession. Certified Profitability Professionals (CPP) have a professional obligation to the organization they serve, its customers, stockholders, directors and the general public.

A CPP shall:

1. Perform their duties with objectivity, due diligence and professional care, in accordance with professional standards and best practices.
2. Respect the confidential and proprietary nature of information received in the performance of their duties, refrain from disclosing such information unless disclosure is required by legal authority. Never use this information for personal gain and not knowingly permit any other person to use such information for personal gain.
3. Serve in the interest of stakeholders and refrain from entering into any activity that is in conflict with the interests of the organization. Avoid activities or the acceptance of anything of value that prejudice their ability to objectively discharge their professional duties and responsibilities.
4. Strive to enhance the knowledge and skills necessary to competently and effectively perform their duties.



# Membership & Benefits

Membership in AMI<sup>fs</sup> is open to employees and companies within the financial services industry or full-time university students and faculty. Members receive all the benefits of membership as described in this guide including:

- ◆ Discounts to all educational programs
- ◆ Journal of Performance Management subscription
- ◆ Quarterly newsletter – AMI<sup>fs</sup> Bulletin
- ◆ Monthly e-Bulletin
- ◆ Unlimited access to the website
- ◆ Access to Job Bank listings
- ◆ Participation in the AMI<sup>fs</sup> Certificate Program
- ◆ Participation in Peer Consulting and Member Bulletin Boards
- ◆ Opportunities to participate in industry research
- ◆ And many other benefits associated with membership

AMI<sup>fs</sup> offers two types of membership. Individual and Corporate. Individual and Corporate members receive the same benefits although Corporate members are limited to three copies of the Journal.

**Individual Memberships** are \$350 per person per year. Use the Individual membership application located in this guide.

**Corporate Memberships** are \$1200 per company per year. Corporate memberships allow companies to share all the many benefits of AMI<sup>fs</sup> with the entire staff. Complete the Corporate Membership application in this guide and select a company password. Any additional corporate members must use this password.

Completed applications for membership can be mailed or faxed to the AMI<sup>fs</sup> offices. For faster service and instant access to the many benefits of the association, join online at [www.amifs.org](http://www.amifs.org).

## **PUBLICATIONS**

AMI<sup>fs</sup> provides members with three publications, all of which serve as a means to communicate frequently with our members on relevant topics.



The **Bulletin** is our quarterly newsletter that highlights future AMI<sup>fs</sup> activities, reviews recent events, provides economic and market updates, includes the AMI<sup>fs</sup> calendar, Job Bank summaries, and general reports about member benefits.

For over seventeen years the Association's Journal of Performance Management has been a key source for information covering the art and science of performance-based accounting. No other publication is solely dedicated to the mission of advancing performance measurement activity specific to the financial services industry. Many of the articles are timeless, treasured pieces that are a must have for those seriously devoted to this management discipline. Members often point to the Journal as a valued information resource, especially when their organization embarks on expanding or evolving their management accounting processes.

A complete listing of over 250 Journal articles is available in hard copy and on the website.

The rapid advancement of technology and the advent of the **e-Bulletin** electronic newsletter have provided AMI<sup>fs</sup> with the opportunity to keep members up to date on calendar items and event registrations. This bulletin is a great tool for prompting members to participate in industry surveys, register for upcoming training, and notify members of important industry news.

