



California Bankers Association Fintech Member Application

Please type or print clearly

Application Date: _____

Organization Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Primary Contact: _____ Title: _____

Telephone: _____ Fax: _____

E-mail Address: _____

Secondary Contact: _____ Title: _____

Telephone: _____ Fax: _____

E-mail Address: _____

Company Website: _____

Fintech Membership – Any corporation, partnership, association, or similar organization that is not an “insured depository institution” and that provides computer programs and other technology to support, automate, or enable traditional forms of banking and financial services for businesses and consumers alike. *(CBA Executive Management Approval Required)*

**Fintech Membership
Annual Fee: \$20,000**

Benefits Include: Fintech Legislative Committee on Public Policy | Legislative Tracking | Quarterly Briefing on Legislative Issues | Inclusion in New Fintech Corner of CalBanker Magazine | All of the benefits of the Associate Member Tier | Member Pricing at CBA Conferences (Not required to sponsor to attend) | Networking Opportunities at CBA Events

- 1) I understand that the membership dues are payable upon receipt of the annual invoice unless written notice is submitted to CBA of our intent to cancel membership immediately upon receipt of the annual invoice.
- 2) Upon approval of Fintech membership:
 - a. It is understood and agreed that no endorsement of the fintech members' products and services are implied or intended.
 - b. It is understood and agreed that CBA fintech membership does not include permission to use of the CBA logo.

Authorized Signature

Date

Dues to the California Bankers Association are not deductible as a charitable contribution for federal income tax purposes, but may be deductible as an ordinary and necessary business expense. A portion of the dues, however, is not deductible as an ordinary and necessary business expense to the extent that the California Bankers Association engages in lobbying.

EMAIL OR MAIL APPLICATION TO:

California Bankers Association ATTN: Janae Kimpel 1303 J Street Suite 600 Sacramento, CA 95814-2939
jkimpel@calbankers.com T: (916) 438-4416

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In order to expedite a timely approval process of your application, please provide the following information and return this form with your membership application:

- 1) Please submit the following electronically to jkimpel@calbankers.com with the subject line Fintech Member Application.
 - a. A short (1-2 paragraphs) company bio or summary of your business services or the products you provide to FDIC insured financial institutions.
 - b. Two print-ready company LOGO's in electronic format (JPG and EPS/PDF)
- 2) The date your organization began providing services to depository institutions: _____
- 3) If you have changed the name of your organization, please indicate previous name(s) you have done business under: _____
- 4) Please list your top three competitor's: 1. _____ 2. _____ 3. _____
- 5) Please provide a list of three active client bank references who CBA may contact on your behalf. Please note CBA will contact any references provided.

CONTACT NAME	BANK	EMAIL ADDRESS (required)

6) Please indicate your organization's interest in becoming a sponsor/exhibitor for any of the following programs:

- | | | |
|---|--|--|
| <input type="checkbox"/> Bank Presidents Seminar
<input type="checkbox"/> Annual Conference
<input type="checkbox"/> Women in Banking Forum | <input type="checkbox"/> Bankers Summit
<input type="checkbox"/> Virtual Events
<input type="checkbox"/> Networking Mixers | <input type="checkbox"/> Annual Legislative Forum
<input type="checkbox"/> Washington D.C. Legislative Events |
|---|--|--|

7) Please choose one category that best describes your business for purposes of associate member listing on the CBA website:

- | | |
|---|---|
| <input type="checkbox"/> Accounts Receivable Financing
<input type="checkbox"/> Auctions
<input type="checkbox"/> Auditing & CPA firms
<input type="checkbox"/> Bank/Branch Building & Design
<input type="checkbox"/> Bank Card Services
<input type="checkbox"/> Bank Equipment/Supplies
<input type="checkbox"/> BSA/AML
<input type="checkbox"/> Check Program
<input type="checkbox"/> Collection Agencies
<input type="checkbox"/> Compensation/Executive Plans
<input type="checkbox"/> Compliance Consultants
<input type="checkbox"/> Technology Solutions
(hardware, software, internet)
<input type="checkbox"/> Consulting Firms
<input type="checkbox"/> Correspondent Services
<input type="checkbox"/> Data Processing/ATM Services
<input type="checkbox"/> Disaster Recovery
<input type="checkbox"/> Education | <input type="checkbox"/> Facility Maintenance
<input type="checkbox"/> Financial Services/Investment Banking
<input type="checkbox"/> Foreclosure Services
<input type="checkbox"/> Human Resources
<input type="checkbox"/> Insurance
<input type="checkbox"/> Law Firm
<input type="checkbox"/> Marketing
<input type="checkbox"/> Mortgage Services
<input type="checkbox"/> Other (please specify) _____
<input type="checkbox"/> Payment Processing
<input type="checkbox"/> Real Estate
<input type="checkbox"/> Receivership
<input type="checkbox"/> Risk Management
<input type="checkbox"/> Security
<input type="checkbox"/> Staffing
<input type="checkbox"/> Trust Related Products & Services
<input type="checkbox"/> Unclaimed Property |
|---|---|

Please return completed application and requested documents either via email or mail to:

California Bankers Association
 ATTN: Janae Kimpel
 1303 J Street, Suite 600
 Sacramento, CA 95814-2939

jkimpel@calbankers.com
 T: (916) 438-4428