Membership Value

Wealth Management & Trust
A DIVISION OF TEXAS BANKERS ASSOCIATION

We are a one-of-a-kind state organization dedicated to serving the unique needs of wealth management and trust companies and professionals. For 90 years, we have provided tailored education, information, advocacy, outreach and professional networking for our members. Today, more than ever, that translates into membership value.

Education

With our schools, seminars and conferences, we help you and your associates develop and refine the professional tools you need to stay informed and stay competitive. A diverse menu of learning opportunities offers professionals of all levels curriculum covering the industry's hottest topics. It also offers the benefit of continuing education credit, all at significant member discounts.

Information

Our regular, online newsletters and bulletins provide you current information about industry trends, regulations, pending legislation and general news related to the wealth management and trust industry. We also offer a menu of professional reference publications addressing policies, procedures, compliance and the latest trust laws at significant member discounts.

Advocacy

Because the wealth management and trust industry comes under scrutiny at the state and federal levels, you need a strong and active voice representing your interests. We are that voice. We have a proven track record with the Texas Legislature and a strong relationship with members of Congress. Our advocacy efforts ensure your interests are heard and protected, and that you stay informed throughout the process.

Wealth Management & Trust
203 W. 10th Street
Austin, Texas 78701

www.texasbankers.com/trust

Outreach

Powerful trends in market competition and workforce demographics generated new outreach initiatives by Wealth Management & Trust to promote the use of professional fiduciaries with centers of business influence and to attract and retain a talented workforce. Wealth Management & Trust members will reap the benefits of this outreach and more favorable positioning for our industry.

Professional Networking

Our events offer you and your associates valuable networking opportunities with peers and decision-makers in the wealth management and trust industry. Whether you seek to establish new business relationships or to strengthen existing ones, our events present opportunities for direct interaction with a targeted industry market. Whether you choose to participate as an attendee, exhibitor or sponsor, you can benefit from our events and highlight your role in our industry community.

New! Student Memberships

The wealth management and trust industry has proven to be a successful, fulfilling career choice for graduates from law, business and finance schools. Fields of study such as accounting, business, finance, financial planning, management, marketing, pre-law, psychology, sociology, and specialty areas like agriculture, farm and ranch, and even geology are all important in our industry. For interested students, we offer affordable memberships that provide access to valuable industry news and contacts as well as dramatic discounts on industry training. This provides a unique understanding of our profession and a potential leg up on competition for related jobs.

Wealth Management & Trust
A DIVISION OF TEXAS BANKERS ASSOCIATION

Membership Application

Active Membership Dues Schedule

Any national or state financial institution or trust company authorized to exercise fiduciary powers in the state of Texas.

Total Managed Trust Assets	Dues
0 – 20 million	$900
20 – 100 million	$1,250 *+ $8 per million over 20 million*
100 – 200 million	$1,770 *+ $4 per million over 100 million*
200 – 500 million	$2,290 *+ $2 per million over 200 million*
500 million – 1 billion	$3,520 *+ $1 per million over 500 million*
1 – 3 billion	$4,770 *+ $.50 per million over 1 billion*
3 billion and over	$9,250 *+ $.40 per million over 3 billion (Shall not exceed $10,000)*

Associate Membership Dues Schedule

(1) *Any national or state financial institution or trust company exercising fiduciary powers outside the state of Texas and having no substantial trust operation within the state of Texas.*

Total Managed Trust Assets	Dues
0 – 200 million	$900
200 – 500 million	$1,100 *+ $2 per million over 200 million*
500 million – 1 billion	$1,700 *+ $1 per million over 500 million*
1 billion – 3 billion	$2,300 *+ $.50 per million over 1 billion*
3 billion and over	$4,500 *+ $.40 per million over 3 billion*

(2) *Any corporation or firm associated with the trust financial services industry but not exercising fiduciary powers – e.g., industry vendors and suppliers.* $750

(3) *Any individual associated with the trust financial services industry – e.g., attorneys, financial planners, CPAs, service providers.* $200

Limit of two individual memberships from a company or organization otherwise eligible for associate membership.

(4) *Any student interested in the wealth management and trust industry.* $75

Includes access to industry news and contacts; $100 registrations for any one-day seminars (regularly $495); and 50 percent discounts on any multiple day events.

Registrant Information

Full Name ❑ Mr. ❑ Ms.

Title

Institution / School

Area of Trust / Major & Minor

Physical Address (City / State / Zip)

Mailing Address, if different from above (City / State / Zip)

Phone

Fax

E-mail

Federal tax law prohibits the deduction of lobbying expenses for federal income tax purposes. Organizations like TBA, which assess member dues, are required by law to notify their members of the portion of their dues attributable to lobbying and therefore non-deductible on your federal tax return. For the year June 1, 2013, through May 31, 2014, it is estimated that 11% of your dues will be attributable to lobbying as defined by the IRS. Contributions to TBA are not charitable contributions; however, they may be deductible as a legitimate business expense.

Payment Options

❒ Check (payable to Texas Bankers Association)

❒ Invoice

Credit Card ❒ MasterCard ❒ Visa ❒ AmEx

Card number

Expiration date Security code

Cardholder's name

Cardholder's signature

Billing address

Please return to Wealth Management & Trust • 203 W. 10th Street • Austin, Texas 78701
or e-mail to ashlee@texasbankers.com
Phone: (512)472-7391 • Fax: (512)472-0130