

## Instil Membership Upgrading Application

As these details are of a private and confidential nature, please PRINT out the completed form and forward to the above postal address or fax number.

★ Please click on one box of your choice.

### Personal Information and Contact Details

#### Personal Information

Title:	First name:
Preferred Name:	Surname:
Preferred Region: (cross) <input type="checkbox"/> NSW/ACT, <input type="checkbox"/> QLD/NZ, <input type="checkbox"/> VIC/TAS, <input type="checkbox"/> SA/NT/WA	
DOB:	Sex: <input type="checkbox"/> M <input type="checkbox"/> F Professional Development Stream: <input type="checkbox"/> Director <input type="checkbox"/> Manager <input type="checkbox"/> Both
Email:	Subscribe to email: Yes <input type="checkbox"/> No <input type="checkbox"/>

#### Company Name:

Title/Position: \_\_\_\_\_

#### Contact Numbers: please tick the preferred contact number

Home: \_\_\_\_\_  Work: \_\_\_\_\_

Mobile: \_\_\_\_\_

**PLEASE ENSURE YOU READ THE MEMBERSHIP CRITERIA BEFORE SELECTING YOUR NEW MEMBERSHIP GRADING. ALSO ATTACH EVIDENCE TO SUPPORT YOUR APPLICATION.**

#### Previous Membership Category

Fellow  Associate Fellow  Member  Associate  Affiliate

#### Upgrade Membership Category to

Fellow  Associate Fellow  Member

**Please provide details stating how you meet the criteria for the upgraded category.**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### Office Use Only

Membership Category Approved: Yes \_\_\_\_\_ No \_\_\_\_\_

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

Approved by: \_\_\_\_\_

## THE Instil MEMBERSHIP CATEGORISATION SYSTEM

Grade	Criteria	Postnominals
<b>Fellow</b>	A minimum of 15 years experience as a director or manager of a mutual ADI or other mutual Organisation; or a minimum of 10 years experience as a director or manager of a mutual ADI or other mutual Organisation & a minimum of 1 year as a mutual ADI or other mutual Organisation chief executive (or equivalent) or mutual ADI or other mutual Organisation chairman; or a minimum of 5 years experience as director or manager of a mutual ADI or other mutual Organisation & a minimum of 3 years as a mutual ADI or other mutual Organisation chief executive (or equivalent) or mutual ADI or other mutual Organisation chairman; or a minimum of 5 years experience as a director or manager of a mutual ADI or other mutual Organisation & successful completion of the <i>Diploma of Financial Services</i> FNS04 (Credit Union / Building Society Directorship) <b>or</b> recognised degree/ postgraduate diploma from an accredited educational institution.	<b>FAMI</b>
<b>Associate Fellow</b>	A minimum of 10 years experience as a director or manager of a mutual ADI or other mutual Organisation; or 5 years experience as a director or manager of a mutual ADI or other mutual Organisation & a minimum of 1 year as a mutual ADI or other mutual Organisation chairman or chief executive (or equivalent)	<b>AFAMI</b>
<b>Member</b>	A person holding the office of mutual ADI or other mutual Organisation director; or employed in a functional area of management in a mutual ADI or other mutual Organisation with decision-making powers that affect the objectives of the organisation.	<b>MAMI</b>
<b>Associate</b>	A person holding the position of mutual ADI or other mutual Organisation alternate or associate director; or A person who is employed in a mutual ADI or other mutual Organisation in a managerial, trainee managerial, or supervisory position, or in any other position deemed appropriate by the Board, but who does not meet the eligibility requirements to be a Member.	<b>AAMI</b>
<b>Affiliate</b>	A director or trustee, an alternate or associate director of a mutual ADI or other mutual Organisation service provider or credit union Foundation Australia Ltd; or A person who is a director or is employed in a managerial position in an organisation which conducts business with mutual ADI or other mutual Organisation; or A person employed in a managerial position in an organisation conducting business with mutual ADI or other mutual Organisation; or A person employed by an organisation representing mutual ADI or other mutual Organisation, a subsidiary or company related to that body in a functional area of management.	<b>(none)</b>

### Office Use Only

Membership Category Approved:      Yes                      No

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

Approved by: \_\_\_\_\_