

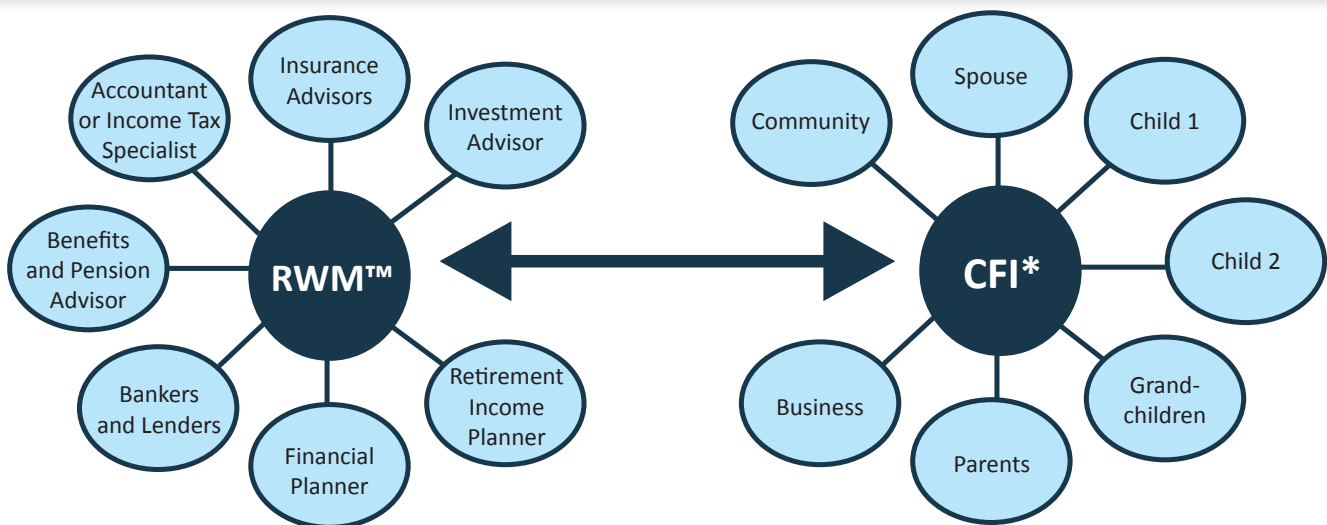


**A NATIONAL NETWORK OF FINANCIAL SPECIALISTS WHO ENABLE PEACE OF MIND THROUGH PROFESSIONAL COLLABORATION**

### The Society Has Four Primary Missions:

- **The Society.** To establish a network of highly-skilled tax and financial intermediaries who follow the RWM™ framework focused on a strategic, multi-disciplinary advisory approach to sustainable family wealth.
- **The Client.** To provide an environment of mutual trust and collaboration between stakeholders who are empowered to build strong, multi-generational relationships. Their mutual goal is to create Real Wealth and financial peace of mind.
- **The Individual Advisors.** To enhance visibility and promote the work of highly-trained Real Wealth Managers™ (RWM™) who represent the RWM™ framework in various professional and regulatory relationships.
- **The Community.** To lobby for regulators, professional organizations and governments to recognize members' credentials, and specialized expertise as well as provide feedback on legislation, regulations, or industry requirements as they are introduced in the future.

### Take a Multi-Stakeholder Approach to Strategic Real Wealth Management



**CHARTER MEMBER INTRODUCTORY OFFER: Only until June 30!**



Let's connect: [www.rwmsociety.org](http://www.rwmsociety.org) | Email: [communications@rwmsociety.org](mailto:communications@rwmsociety.org) | Phone: 1-866-953 4769

YES, PLEASE INCLUDE ME AS A CHARTER MEMBER OF THE SOCIETY OF REAL WEALTH MANAGERS™

### WHAT YOUR ANNUAL FEES PROVIDE:

- **Your listing on the Society of RWM™ pages:** Plus, receive your approved RWM™ or RWM™ stakeholder logo for use on your own website and social media promotional materials.
- **An annual subscription to the RWM™ Calculators:** 15 highly-sophisticated software tools to calculate RWM™ solutions (a \$795 value). This subscription qualifies for 15 non-verifiable credits for your professional development.
- **Get your RWM™ Designation:** save 10% off tuition fees, or take the RWM™ Challenge Examination.
- **An opportunity to enter as a special privilege stakeholder:** Graduates of any Knowledge Bureau Designation program and other approved professional designations are eligible. Without an RWM™ Designation, an open-book Challenge Exam on the Real Wealth Management™ strategy and process must be passed.

### YOUR INFORMATION

I give my permission for this information to be used for listing on the RWM™ member website. (Please provide a JPEG photo with your application)

Name (first/last): \_\_\_\_\_

Company/Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Home Phone: ( ) \_\_\_\_\_ Cell Phone: ( ) \_\_\_\_\_ Work Phone: ( ) \_\_\_\_\_

Designations  RWM™  MFA™  RWM™ Challenge Exam  
 MFA-P™  Other credentials - please specify:  
 DFA-Tax Services Specialist™  
 DFA-Bookkeeping Services Specialist™ \_\_\_\_\_

Note: the RWM™ Challenge Exam is required for membership if you do not have the RWM™ Designation.

### MEMBERSHIP FEES & EDUCATIONAL OPTIONS:

For the fiscal year: March 1, 2020 to February. Exam available April 2020

TAKE ADVANTAGE OF INTRODUCTORY CHARTER MEMBERSHIP PRICING VALID UNTIL JUNE 30, 2020

MEMBERSHIP OPTIONS FOR THOSE WITH RWM™ CREDENTIALS:	
<input type="checkbox"/> RWM™ Designate Charter Membership	\$195
<input type="checkbox"/> Special Privileges Charter Membership (RWM™ Challenge Exam taken)	\$195
<input type="checkbox"/> Charter Membership for Undergraduates	\$295

DO YOU NEED TO EARN YOUR RWM™ DESIGNATION? (Save \$100 off regular tuition of \$995 with Society of RWM™ membership)	
<input type="checkbox"/> RWM™ Program	\$895
<input type="checkbox"/> Take the RWM™ Challenge Exam <small>*Required for Special Privileges Membership</small>	\$895

For more information about the Real Wealth Management™ Designation program, curriculum, academic and refund policies, and procedures and technology specs go to: <https://www.knowledgebureau.com/site/faq> or call 1.866.953.4769

### PAYMENT METHOD:

Total Before Tax: \$ \_\_\_\_\_

Plus Taxes: \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Total Due: \$ \_\_\_\_\_

E-Transfer\*  Visa  MasterCard

Credit Card Number: \_\_\_\_\_

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

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

### REFER A FRIEND:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

I agree to receive course updates, scheduling, communications, certification and transcripts from Knowledge Bureau and the Society of Real Wealth Managers™