**Independent Investment Management Initiative (IIMI)**

**MEMBERSHIP APPLICATION**

Dear Sir/ Madam,

We are delighted that you would like to become a member of the IIMI. Please kindly complete the application form below and return it via email to [dani.hristova@theiimi.org](mailto:dani.hristova@theiimi.org)

Upon receipt of a completed application form and approval from the IIMI Board that your membership is granted, we will issue you with an invoice.

|  |  |
| --- | --- |
| Name of company: |  |
| Address of company (HQ): |  |
| Key contact name: |  |
| Key contact title: |  |
| Key Contact email address: |  |
| Key Contact Telephone/ Mobile: |  |
| Date of establishment: |  |
| Asset under management/advice: |  |
| Number of employees: |  |
| Corporate structure (LLP / Ltd Company / PLC etc): |  |
| In which countries do you have offices? Please list all: |  |
| Please list your key markets in terms of client domicile / revenue: |  |
| Which industry organisations are your firm a  member of? (AIMA, BBA, IA, WMA): |  |
| In which activities are you involved? (please list all that apply):   * Wealth Management * Fund Management * ACD * Other (Please specify) |  |
| In which asset classes / strategies do you invest? (please list all that apply):   * Long-only * Long/Short * Equities * Fixed Income * Multi-asset * Fund of Funds * Derivatives * Real Estate * Commodities * Crypto Currencies * Other (Please specify) |  |
| In which regions do you invest? (please pick most applicable / all that apply):   * Global * UK * US * Japan * Asia * Europe * EAFE * Emerging Markets * Frontier Markets * Other (please specify) |  |

When conducting its activities, the IIMI takes a holistic view of the asset management industry and looks to represent the key functions across our member firms. With this in mind, please kindly provide contact details of key personnel across the below departments:

|  |  |  |
| --- | --- | --- |
| Department: | Name: | Email address: |
| Business Leadership / CEO |  |  |
| Investment |  |  |
| Distribution |  |  |
| Compliance |  |  |
| Operations |  |  |
| ESG |  |  |
| Human Resources |  |  |

Signed by Date

For and on behalf of the Applicant