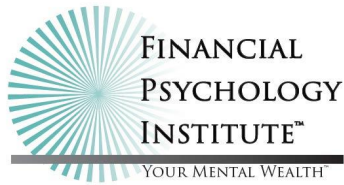


Application for Membership





Financial Psychology Institute™ Application

Please send completed application to: brad@klontzconsulting.com

Which FPI program/s interests you (check all that apply):

- FPI *Financial Advisor* Consulting Program
- FPI Training for *Mental Health Providers*
- Certification as a Financial Behavior Specialist™

Full Name: _____

Preferred Name or Nickname (if any): _____

Company: _____ Position: _____

Primary Profession: financial advising mental health
 Other: _____

Name as you like it to appear on any certificates or the FPI website:

Date of Birth: _____

EDUCATIONAL HISTORY (attach additional pages as needed):

Degree: _____ Year Awarded: _____

Field of Study: _____ Institution: _____

Degree: _____ Year Awarded: _____



Field of Study: _____ Institution: _____

Professional Certifications/Licenses: _____

Mailing Address: _____

City, State, & Zip Code: _____

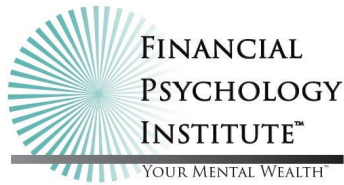
Work Phone: _____ Mobile/home Phone: _____

E-mail Address: _____

How did you hear about us? _____

Please describe your professional goals as they relate to financial psychology (attach additional pages as needed):

PLEASE INCLUDE A CURRICULUM VITAE/RESUME WITH YOUR APPLICATION.



Financial Behavior Specialist™ Certification:

1. Please see www.YourMentalWealth.com for requirements.
2. If you have met the requirements for certification*, please send the following:
 - a. Curriculum vitae/resume, highlighting your formal studies in financial planning, financial psychology, behavioral finance, mental health, etc.
 - b. Copy of college/university transcripts.
 - c. Detailed descriptions of other financial psychology-related professional trainings completed, including copies of certificates of completion, contact hours, name of trainers, sites, topics, etc.
 - d. A listing of your applicable professional memberships, activities, and publications.
 - e. Details of related professional work experience (if not described in your curriculum vitae/resume).
 - f. Two letters of recommendation from professionals familiar with financial psychology or financial therapy, and who are also familiar with your work.
3. Send a check or money order for \$100 payable to the Financial Psychology Institute and other required materials to:

Financial Psychology Institute™
4351 Kauila Street
Lihue, HI 96766

*Based on a review of your application materials, the FPI may take one of the following actions:
a) award the certification, or b) develop an individualized action plan to help the applicant meet the requirements of certification