

AITCO is a highly focused organization, providing a forum for members of the independent trust and financial advisory communities. The enormous growth in wealth-building offers unique opportunities for professionals committed to providing clients with high quality, personalized financial advisory services. The organization provides an arena for member interaction, networking, education and development.

Benefits of AITCO Membership

AITCO Executive Retreat

Held annually, the conference typically attracts more than 50 financial executives to an information-packed program which addresses the practical issues and challenges of doing business within the trust and financial advisory industry.

Educational session presenters include top industry leaders, as well as nationally recognized business experts and consultants. Session topics include current legislative issues and the latest marketing strategies.

In addition, the conference features numerous networking activities and small-group roundtables to help attendees build industry relationships and obtain feedback about some of their individual business concerns.

Many vendors, including mutual fund companies and investment software firms, also are on hand to demonstrate how the latest products and services can help attendees achieve their business goals.

AITCO Advisor Newsletter

This periodic communication features professionally written articles on marketing and legislative issues as well as association updates.

AITCOConnect

This internet community of AITCO members serves as a daily peer-to-peer networking opportunity for members to share experiences and ideas.

Web Site

By visiting www.aitco.net, members have access to information on upcoming events. They can also register for the annual retreat, tap into member web sites and connect with leading vendors.

The member database is searchable by category as well as name and state, allowing members to easily access the resources represented by other members and vendors.

The AITCO Web site also serves as an information resource for prospective clients and provides the visitor with helpful information, including how to contact AITCO members through the referral search.

Legislative Support

AITCO helps its members respond to regulatory issues. Members have stated that legislative and policy updates such as the US Patriot Act have been very useful. By providing you with the guidance from AITCO's General Counsel, we keep you aware of laws and issues that affect trust companies and act as your voice on legislative issues.

Initiatives

AITCO continues to explore other ways to help its members build their businesses, and to educate consumers about the benefits of working with a professional financial advisor.

For more information on AITCO and AITCO membership, call 312-223-1611, send your inquiry by fax to 312-580-0165 or mail aitco@gss.net.

Membership Application

Name: _____

Title: _____

Company: _____

Address: _____

City, State, Zip _____

Phone: _____

Fax: _____

E-Mail: _____

Web Site: _____

Please refer to other side of application for explanation of membership categories.

Regular Membership	\$950
Year Organized: _____	
Number of Employees: _____	
Asset Size: _____	

Associate	\$550
Year Organized: _____	
Number of Employees: _____	
Asset Size: _____	

Resource Partner	\$950
Community Bank	\$950
Special	\$950

RETURN COMPLETED APPLICATION FORM & CHECK OR CREDIT CARD INFORMATION TO:

AITCO 8 S. Michigan Ave – #1000 Chicago, IL 60603

CREDIT CARD INFORMATION:

MasterCard Visa American Express

Card Holder Name: _____

Account Number: _____

Expiration Date: _____

Cardholder Signature: _____