2024 REQUEST FOR RETIRED MEMBER STATUS

Members can obtain Retired Member status and pay a reduced Member fee if conditions 1 to 4 are met. The Retired Member fee will be waived if conditions 5 or 6 are met in addition to conditions 1 to 4.

I hereby certify: (please select all conditions that apply)

- ☐ 1. I am 55 years of age or older.
- ☐ 2. I do not perform business valuation and related financial services; as determined by the Institute.
- ☐ 3. I do not have Active Income from any source in excess of $50,000 in a year.

  "Active Income" means gross income from all employment or director's fees, and/or net income from self-employment. Active Income does not include employment insurance benefits, pension income or other retirement income, investment income, support payments, or disability income. Active Income is based on individual earnings, not family earnings. All other sources of income will be considered "active".
- ☐ 4. No person or entity relies upon, or could be reasonably be seen to rely upon, my knowledge or expertise by virtue of my being a CBV.
- ☐ 5. I have had Retired Member status for at least 10 years with the Institute.
- ☐ 6. The sum of my age plus the number of years of membership in good standing equals or exceeds 90.

By signing this application, I agree to inform the Institute if any of the above conditions change.

Name of Member:

Signature :

Date :

Internal use only

Date received:

Approved by: Approved Date:

Signature :

Please submit your form to Carol Walford, Membership Services Coordinator: carol.walford@cbvinstitute.com - Fax: 416 977 7066
277 Wellington Street West, Suite 808 Toronto, ON, M5V 3H2

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