

# Membership Application Form 2019

(Membership period: 1 January to 31 December)

## 1. Your organisation and its work

Name of organisation: .....

Registered Charity Number (if applicable):

How many employees in total (paid and voluntary) are involved in running your advice activities?

How many Full Time Equivalent is this (at 35 hours per week)?

How many people/individuals did you advise in the last 12 months?

How many separate problems/issues in total, did those people seek help with?

Do you charge for any of your advice services? (This does not affect your membership fee)

Yes / No

## 2. Membership Fee

Your membership fee will be pro-rata on a quarterly basis up until December if you join on or after the 2<sup>nd</sup> quarter of the year.\*

Our membership fees are comprised of two elements: **a flat-fee element** and **a graduated element**

- **The flat-fee element** relates to the type and size of your organisation:

Small charity/CIC – volunteers only	£127
Small-Medium charity/CIC with employees	£253
Large charity/CIC or Public sector orgs *	£380
Commercial organisations	£506

\* Includes quangos, housing associations, educational & academic bodies and charities with £10m+ annual income

- **The graduated element** is calculated at 0.001 of your advice activities' running costs above £100,000 (i.e. £1 per £1,000 above £100,000 per annum)

What will it cost (to the nearest £1,000) to run your advice activities this year?

\*in the case of an advice team or unit within a larger organisation, please give the cost of running that team or unit only. **Please fill this in even if your running costs are below £100,000.**

**Please calculate your fee:**

Enter the amount of the appropriate flat-fee

Enter the amount of the appropriate graduated fee (if applicable)

Add the two amounts for the total membership fee

**Total to pay**

### 3. Your insurance

Professional Indemnity Insurance (PII) is a requirement of membership. Please provide the following details.

Name of insurer \_\_\_\_\_

Level of indemnity £ \_\_\_\_\_

Expiry date \_\_\_\_\_

### 4. Declaration

I wish us to become a member of AdviceUK and agree to the terms and conditions of membership. I have read the eligibility criteria and declare that we are eligible for membership

- I declare that all of the information given in this application is correct to the best of my knowledge
- I enclose the appropriate fee
- I understand that membership will not become effective until payment has been received

**Name:**

**Position:**

**Date:**

#### **Payment methods:**

(please tick payment method of choice)

**INTERNET/BACS PAYMENTS:**

- Please send your payment to the bank details below:  
Account Name: **AdviceUK** Sort Code: **60-83-01** Account Number: **53017150**

**CHEQUE:**

- Send a cheque for the above amount made payable to AdviceUK.

**DIRECT DEBIT:**

- I would like to set up a Direct Debit. (We will contact you when we receive your paperwork. Payment will be taken as soon as possible after receipt of paperwork.)

**INVOICE:**

- Please send me an invoice for the membership amount.  
Purchase order number (optional): \_\_\_\_\_

#### **OPT IN TO HELP ACHIEVE MUTUAL GOALS**

**We'd like to keep you informed by email/phone/letter about AdviceUK services, including any special offers. Please tick this box to let us know that you are happy for us to do this. \***

*\* Please note that as part of membership and further to the legitimate interests of AdviceUK. Member newsletters and updates are included as a member benefit and you will automatically be subscribed. You can unsubscribe at any time. By sending an email to the [dataprotection@adviceuk.org.uk](mailto:dataprotection@adviceuk.org.uk) mailbox stating 'OPT OUT' in the subject field or using the unsubscribe links on our member newsletter/update emails.*

AdviceUK is registered in accordance with and seeks to comply with the UK Data Protection Act 2018/GDPR. Information submitted in this form may be stored and processed electronically for the purposes of delivering services, supplying information and to enable statistical analysis. Data may be passed to other parts of the organisation, partner organisations (IAS, VCS, ACMS), companies or contractors operating on our behalf to enable this to take place. This may include transferring or holding your data outside the European Economic Area (EEA). We follow appropriate security procedures in the storage and disclosure of personal information so as to prevent unauthorised access by third parties. We also require those parties to whom we transfer personal information to comply with the same.

Please see our [Privacy Policy \(http://www.adviceuk.org.uk/privacy-policy\)](http://www.adviceuk.org.uk/privacy-policy) for more information on how we use your personal data. (Don't forget, you can change your contact preferences at any time. By sending an email to the [dataprotection@adviceuk.org.uk](mailto:dataprotection@adviceuk.org.uk) mailbox stating 'OPT OUT' in the subject field or using the unsubscribe links on our marketing emails)