



Jersey Finance

Delivering Insight • Driving Innovation

Members Annual Subscription 2021

Membership period from 1 January to 31 December 2021

By signing up to Jersey Finance Membership, you agree to abide by our Members Code of Conduct detailed at the end of this application form.

Company name: _____

Name of signatory: _____

Signed: _____

Date: _____

Website address: _____

Email Address: _____

Social Media (Twitter/ LinkedIn/ Facebook): _____

If you have merged with/acquired another company within the last year, please provide the company name:

Member Definition

To be a Member of Jersey Finance, a Member or a prospective Member must fulfil one of the following conditions:

- Is regulated by the Jersey Financial Services Commission and provides financial services in or from Jersey; or
- Provides financial services in or from Jersey but is not regulated because it can take advantage of an appropriate exemption or is an administrative office that purports to look after one or more families but does not otherwise offer its services to the public; or
- Offers legal, accounting or other professional services related to financial services, including providing technology software or consultancy related to financial services.

Membership and CEO Connect

Available as a 'bolt-on' option to Membership status, CEO Connect allows Jersey Finance to provide its Members' CEOs with timely and informative content which may be helpful from a business planning and strategy perspective. Please note that CEO Connect is available to the CEO or the Managing Director (or equivalent) of Member organisations;

on occasion, when if they are unable to attend the CEO Connect events, they may delegate their place to one of their senior management team within the organisation.

CEO Connect benefits:

- A series of six roundtable thought leadership sessions throughout the year which will include high profile speakers from off-island as well as engagement with senior government and regulatory figures;
- Strategic consultation for Financial and Related Professional Services (FRPS) Policy through 'Chatham House' style bi-annual 'Forward Focus' meetings;
- Advance briefings ahead of report launches;
- The opportunity to publish Jersey related events on our website;
- The opportunity to publish Jersey based jobs on our website; and
- An enhanced profile in our Members Directory.

Membership

Membership 2021		
Headcount (Full Time Equivalent)	Tariff	Tick
501+	£26,540	<input type="checkbox"/>
301-500	£23,225	<input type="checkbox"/>
151-300	£19,950	<input type="checkbox"/>
126-150	£14,995	<input type="checkbox"/>
101-125	£9,920	<input type="checkbox"/>
76-100	£7,515	<input type="checkbox"/>
51-75	£5,400	<input type="checkbox"/>
26-50	£2,910	<input type="checkbox"/>
11-25	£1,665	<input type="checkbox"/>
6-10	£1,250	<input type="checkbox"/>
1-5	£870	<input type="checkbox"/>
Trade Association	No charge	<input type="checkbox"/>



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CEO Connect (In addition to Membership)

CEO Connect		
151+	£5,460	<input type="checkbox"/>
51-150	£2,730	<input type="checkbox"/>
1-50	£1,095	<input type="checkbox"/>

Payment method	
Bank Transfer	<input type="checkbox"/>

Details to be displayed on the Jersey Finance website

Company name: _____

Postal address: _____

Telephone number: +44 (0) _____

Email address: _____

Website: _____

Subsidiary/trading company name 1: _____

Subsidiary/trading company name 2: _____

Once you submit this form to us, we will send you a link to an online survey, for further information about your company. Once this has been completed, we will add your information to our website Business Directory.



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Please tick the relevant categories to indicate the type of business undertaken by your company and any subsidiaries.

Key area of business specialisation	Company	Subsidiary/ Trading co. 1	Subsidiary/ Trading co. 2
Accountancy			
Banking			
Business / Management Advisory Services			
Captive Insurance			
Compliance & Risk			
Corporate Services			
Depository Services			
Family Office			
Financial Planning Services			
Fintech			
Fund Administration Services			
Fund Managers			
Independent Financial Advisers			
Insurance			
International Employee Benefit Administrators			
Investment Banking			
Investment Advisers			
Investment Managers			
Islamic Finance			
Legal Services			
Lending			
Life & Pensions			
Marine/Aviation Services			
Mortgage Brokers			
Philanthropic Services			
Registrars			
Socially Responsible Investing / Sustainable Investing			
Stockbrokers			
Taxation Practitioners			
TISE Listing Sponsors or Trade Services			
Trade Association			
Trust and Company Administration			
Wealth Management / Planning			
Other (please specify)			



Market Interest

In which markets do you have an interest/presence?

Location	Tick
Africa	
Asia	
Channel Islands	
Europe	
Gulf Region	
Latin America	
North America	
Russia/CIS	
UK	

Key Contacts

Please name any key contacts to be listed on your profile page on our website - we will be in touch to request photos in due course.

Contact Details – Please complete in full
Lead contact:
Email:
Direct line:
CEO:
Email:
Direct line:
Marketing Head/Director:
Email:
Direct line:
HR Head/Director:
Email:
Direct line:
By completing this application form and becoming a Jersey Finance Member, you are consenting to receive marketing communications from Jersey Finance Limited, which includes our weekly newsletter, Industry Insight.

Please could you confirm the contact and the email address of the person we can contact regarding membership renewal/ invoicing.

Name: _____

Email Address: _____

Jersey Finance communication for all employees



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Please note that once your company membership is set up, your employees can have full access to our website and communications. They can sign up and open an account at www.jerseyfinance.je/join.

Please return your completed subscription form to:

Scan: jersey@jerseyfinance.je

Post: 4th Floor, Sir Walter Raleigh House, 48-50 Esplanade, St Helier, Jersey, JE2 3QB
We will issue your invoice based on the information you have provided.

Data protection and confidential information

Jersey Finance may record, retain and use for monitoring, statistical analysis or marketing purposes information on or from your access to and use of the website and the JFL Benefits and/or Membership. Please visit www.jerseyfinance.je/privacy for more information on how and for what purposes Jersey Finance uses your personal data.



Jersey Finance Members Code of Conduct

Take positive steps to support our work

While most organisations already have internal compliance and best practice policies, it's vital that our Members also adhere to the Jersey Finance Code of Conduct.

- Every Member, together with their employees and clients, should always act lawfully and with integrity.
- Members should not act in any way that brings, or has the potential to bring, Jersey, Jersey Finance or the finance industry into disrepute. They should also avoid engaging in any activity that damages, or has the potential to damage, the reputation of Jersey, Jersey Finance or the finance industry.
- Recognising that there's limited tax advice given from Jersey, Members who do provide tax advice should ensure their clients have a clear understanding of the appropriate options available to them under the applicable law. However, there are certain types of abusive arrangements that are regarded as controversial and contrived. We strongly advise against Members proposing, advocating, recommending or implementing such schemes.
- Members who provide tax advice should not advise their clients to enter into transactions with the primary purpose of securing a tax advantage that's contrary to the intention of the respective jurisdiction's parliament in enacting the relevant legislation. Whenever a Member gives advice, they should take into account the prevailing public interest considerations and any potential reputational risk to themselves, their clients and Jersey. They should also ensure they don't exploit social policy legislation such as tax reliefs for charities.
- With an open and honest approach, Members should support transparent relationships with tax authorities, where all parties work together with mutual trust and respect, enabling constructive dialogue and responsiveness.
- As part of our international promotional activities, we focus on demonstrating Jersey's clear strengths as a forward-thinking jurisdiction of both substance and transparency. Members who follow our Code of Conduct will be ready to reinforce this positive message and support the vital work we're doing to build a bright future for our Island.