



Members Annual Subscription 2019

Membership period from 1 January to 31 December 2019

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/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.

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;

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 regarding direction of Jersey Finance's 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
- An enhanced profile in our Members Directory

Core Membership

Full Membership 2018		
Headcount (FTE)	Tariff	Tick
501+	£25,520	<input type="checkbox"/>
301-500	£22,330	<input type="checkbox"/>
151-300	£19,185	<input type="checkbox"/>
126-150	£14,420	<input type="checkbox"/>
101-125	£9,540	<input type="checkbox"/>
76-100	£7,225	<input type="checkbox"/>
51-75	£5,195	<input type="checkbox"/>
26-50	£2,800	<input type="checkbox"/>
11-25	£1,600	<input type="checkbox"/>
6-10	£1,205	<input type="checkbox"/>
1-5	£835	<input type="checkbox"/>
Trade Association	No charge	<input type="checkbox"/>



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CEO Connect (In addition to Membership)

CEO Connect		
151+	£5,250	<input type="checkbox"/>
51-150	£2,625	<input type="checkbox"/>
1-50	£1,050	<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: _____



Company overview (50 words):

Please enter a short description of the business activities undertaken by your company. This description will be displayed on your company profile on the Jersey Finance website:

Company Name	Description

Please note that if you opt for CEO connect on top of Membership, we will contact you with details about how you can post your Jersey-based jobs and events on your profile on our website.

Company Detail:

This will appear below your company overview on your profile page on our website.

Company detail (200 words)



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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 Consultants			
Captive Insurance			
TISE Listing Sponsors or Trade Services			
Compliance & Risk			
Family Office			
Financial Planning Services			
Fintech			
Fund Administration and Custody			
Fund Managers			
Independent Financial Advisers			
Insurance			
International Employee Benefit Administrators			
Investment Banking			
Investment Consultants			
Investment Managers			
Islamic Finance			
Law			
Lending			
Life & Pensions			
Marine/Aviation Services			
Mortgage Brokers			
Philanthropic Services and SRI			
Private Client Wealth Management			
Registrars			
Stockbrokers			
Taxation Practitioners			
Trade Association			
Trust & Company Administration			
Other (please specify)			



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Market Interest

In which markets do you have an interest/presence?

Location	Tick
Africa	
Asia - Greater China	
Asia - Other	
Asia - South East Asia	
Channel Islands	
Europe	
GCC	
India	
Japan	
Jersey	
Latin America	
North America	
Russia	
UK	
Other (please specify)	

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:
Please tick this box to confirm the consent of these parties to receiving marketing communications from Jersey Finance Limited, which includes our fortnightly newsletter, Industry Insight. <input type="checkbox"/>



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

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

Whilst recognising that most Members will already have internal compliance and best practice policies, Jersey Finance also expects that, as part of the terms of each Member's subscription, each Member shall read and adhere to the following conduct principles (the **Code of Conduct**):

- Members, their employees and clients should act lawfully and with integrity at all times.
- Members should not act in any way which brings, or has the potential to bring, Jersey, Jersey Finance or the finance industry generally into disrepute or engages in activity which damages or has the potential to damage the reputation of Jersey, Jersey Finance or the finance industry generally.
- Whilst recognising that there is limited tax advice given from Jersey, Members that do provide tax advice should inform their clients of the appropriate options available to them under the applicable law. However, there are certain types of abusive arrangements which are regarded as controversial and contrived. JFL strongly advises Members against proposing, advocating, recommending or implementing such schemes to their clients.
- JFL expects that Members providing tax advice should not advise clients to enter into transactions with the primary purpose of securing a tax advantage that is contrary to the intention of the respective jurisdiction's parliament in enacting the relevant legislation; taking into account the prevailing public interest considerations and any potential reputational risk to themselves, their clients and Jersey; not to exploit social policy legislation (for example, tax reliefs for charities).
- Members should support transparent relationships with tax authorities, where all parties behave with mutual trust and respect, enabling constructive dialogue and responsiveness by all parties.
- As part of JFL's international promotional activities, JFL seeks to demonstrate Jersey's quality proposition as a jurisdiction of both substance and transparency. Members acting on this guidance will help to underpin and support this message.



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