

MEMBERSHIP KIT

CHRISTIAN FINANCIAL CONSULTANTS
WITH A **KINGDOM CLASS** FOCUS

GUIDE

DEVELOP

SUPPORT

ENCOURAGE

STRENGTHEN

COMMITMENT



NATIONAL ASSOCIATION OF
CHRISTIAN FINANCIAL CONSULTANTS

WELCOME: It's All About The Kingdom

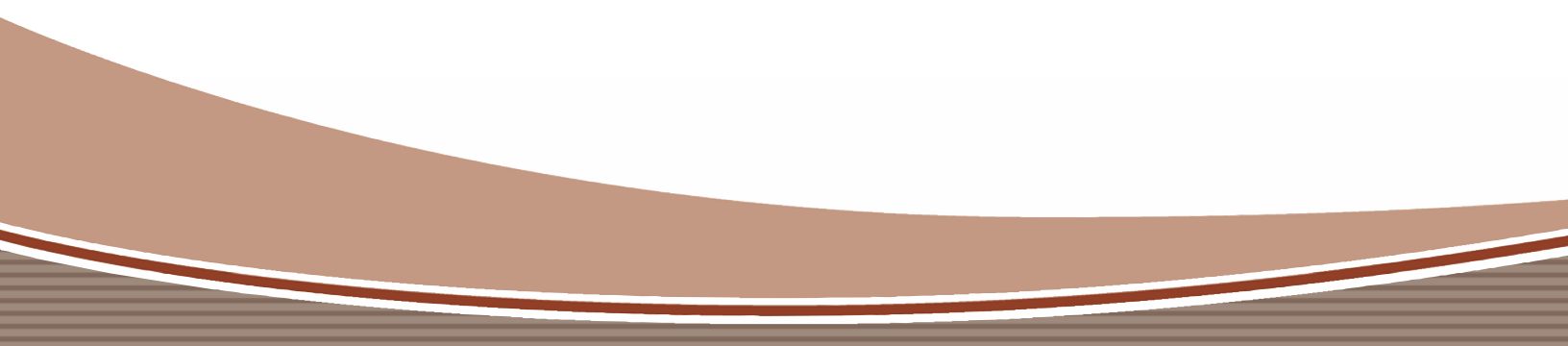
Have you ever have felt uncomfortably out of place over the years as a result of being a Christian financial planner operating in a very secular industry? Well, now is the time to rejoice - just like our Lord told Elijah in I Kings 19: *there are a lot more of us than we thought!*

Consider the potential impact this organization could have on our culture. Picture several thousand Christian planners counseling hundreds of clients each on the full range of biblical stewardship! Most of you know that Scripture says more about money than any other subject (including faith and prayer) by a factor of four. The Lord clearly knew where we would get into trouble yet the church, with rare exception, has provided very little training in this area.

Instead of pointing fingers, however, let's simply take the baton and run with it. Let's get serious about showing our clients how to get out of debt, let's encourage them about tithing and additional charitable giving, let's talk to them about the moral aspects of investing and let's help them become significantly more Kingdom-minded about their estate planning goals. In other words, let's simply conduct our practices the way in which the Lord desires to let us be "*transformed by the renewing of our minds*" (Rom 12:2) and realize that our practice is our ministry!!!

On behalf of the entire board of directors, we encourage you to join our family at the NACFC. Your participation (and the conviction that underlies it) is the backbone of this organization. Thanks for having interest in becoming part of our ever growing community of Christian Financial Consultants.

May God richly bless you, your family and your clients.



Membership

Members of the National Association of Christian Financial Consultants (NACFC) are professionals associated through a personal relationship with our Lord Jesus Christ, and are committed to both investing and financial planning disciplines centered upon biblical principles.

MISSION.

To provide fellowship and educational resources for Christian professional financial consultants seeking to integrate Bible-based principles within their financial consulting practices.

VISION.

Members join together with a common commitment to operate their practices biblically, to share marketing ideas and materials, to maintain the highest possible level of integrity in their personal and professional lives and to counsel their clients on the full range of biblical stewardship. Members will be guided to come to an understanding that their "practices" are not their jobs but rather the ministry in which the Lord has chosen to place them.

MEMBERS.

Members of the National Association of Christian Financial Consultants (NACFC) are professionals associated through a personal relationship with our Lord Jesus Christ and are committed to financial consulting disciplines centered upon biblical principles.

Members of the NACFC will meet the following standards:

- Members will have expressed a testimony to a saving knowledge relationship with our Lord Jesus Christ.
- Members will be professionally trained financial consultants in good standing with industry regulators.
- Members will have their CRD checked upon joining and annually upon renewal.
- Members will commit to integrating biblical financial principles and guidelines into their own lives.
- Members will communicate with their Christian clients concepts of financial accountability of their resources; including charitable giving, debt management, and moral investing.
- Members agree to report any actions or violations, complaints or disciplinary action by regulatory governmental agencies.



Membership Benefits

As members of NACFC, you will receive the following resources and services.

CONNECTIONS

Collaboration, accountability, ministry, encouragement and support of like-minded Christian professionals are among the most rewarding member benefits.

CERTIFICATE OF MEMBERSHIP

Showcase your faith as well as your affiliation with a group of integrity-driven, Christian financial professionals associated through a personal relationship with our Lord Jesus Christ, who are committed to both investing and financial planning disciplines centered upon biblical principles.

INTERNET DIRECTORY

Members can be easily searched by individuals seeking to find Nacfc members who not only share their faith but who will also integrate biblical and financial counsel.

REFERRAL SYSTEM

Whether it is through the internet directory or via direct requests, NACFC members will be referred to individuals requesting Christian consultants in their area. This is a complimentary service we provide to the public and to our members.

ANNUAL CONFERENCES

Year after year, our annual conferences have proven to be life altering experiences. You can look forward to an energizing time of learning to think outside of the box and inside of the Book. In addition, you can plan to grow spiritually and professionally while enjoying an opportunity for networking, support and encouragement in your role as a Christian financial representatives. You are encouraged to bring your family, as they will benefit from the experience while enjoying special activities and getting the chance to familiarize themselves with what you do Monday through Friday.

CFCA® TRAINING

In our efforts to equip and encourage our members to be the salt and light in the financial community, we have designed a Christian Financial Consultant & Advisor (CFCA®) training / certification program. This program is designed to help NACFC members define and enhance their practices while applying Biblical principles as they build a Kingdom-Class Practice.

MEMBERS WEB ACCESS

Once logged-in to this exclusive section of our web-site, you can search archives, customize marketing materials, and find other resources to help in your practice.

MARKETING MATERIALS

NACFC has developed marketing resources for you to use to promote your faith-based investing practice. More than understanding basic biblical principles, these materials help Christian financial consultants to incorporate these principles into the services they offer to clients.

QUARTERLY NEWSLETTER

This informative publication, written not only by veterans in the field, but also includes articles by our members, delivering practical training on implementing biblical wisdom into your advice and counsel. Strengthen your knowledge, ideas, client service and ministry impact .

E-ALERTS

NACFC is dedicated to communicating with its members on a more frequent basis. Some of this will occur through e-mail. You can specify what types of e-mails you would like to receive: Announcements, Annual Conference, Coaching Calls, Monday Morning Minute (A brief tid-bit sent every Monday morning about faith and finances), and Prayer Requests.

Your Spiritual Background

YES NO
ARE YOU A CHRISTIAN?

YES NO
ARE YOU "BORN-AGAIN?"

WHAT IS YOUR CHURCH AFFILIATION?

PLEASE BRIEFLY SHARE YOUR TESTIMONY

YES NO
IS YOUR BUSINESS BIBLICALLY BASED? IF YES, PLEASE EXPLAIN.

Involvement

Please indicate which areas (if any) that you would like to contribute/volunteer or any areas you would like more information.

- AWARDS COMMITTEE
- CONFERENCE COMMITTEE
- COMMUNICATIONS COMMITTEE
 - Tele-Conferences
 - Monday Morning Minute
 - Newsletter
- PUBLIC RELATIONS
- LOCAL CHAPTER
- MEMBERSHIP
- SPONSORS COMMITTEE
- CFCA® TRAINING
- _____

How Did You Hear About Us?

FULL NAME _____ OTHER SOURCE _____

Acknowledgement

Membership in the NACFC is not to be construed to be or implied to represent a certification. While a formal designation program is in fact available to members, it requires added training and qualification. Consequently, it is not allowable to represent NACFC as a professional designation. You may use the NACFC logo on marketing materials, and business cards to indicate membership.

By signing below, I represent that all above statements are true and accurate and that I fully subscribe to and embrace the principles contained in the NACFC Mission Statement and membership information section.

SIGNATURE _____


DATE _____



Submitting Your Application

Please return this application with your membership dues. Your pastor and character letters can follow when they are completed. This will allow us to start the membership process so you can enjoy some member benefits. Once the two supporting letters arrive, and you have been accepted, you will receive all benefits and your certificate.

- PASTORAL / CHURCH LEADER LETTER
- CHARACTER LETTER
- RECENT PHOTO
Mail or e-mail a recent photo (photos will be returned).
- ENHANCED INTERNET LISTING \$45.00
Billed annually, if you would like to take advantage of this benefit, please include the Enhanced Directory form.
- ANNUAL MEMBERSHIP DUES \$195.00
For first-time members joining after June, dues are \$100 through December.
 - Check or Money Order (enclosed)

Visa Master Card Auto Renew (01/31)

CREDIT CARD NUMBER 

SECURITY CODE  EXPIRATION DATE 

RECOMMENDATION

PASTORAL / CHURCH LEADER



Please return this letter of recommendation to the applicant listed below, or send directly to:
1055 Maitland Center Commons, Maitland, Florida 32751
FAX: (407) 644-4574 E-MAIL: WES@NACFC.ORG

_____ is a candidate for membership in the National Association of Christian Financial Consultants, a non-profit professional association. You have been asked to provide a character reference by completing this form or by writing a letter using your own words. We appreciate you taking this time to help us better assess this candidate. This information will be retained on file but not distributed.

Referrer Information

| | | | |
|---|-------|--|----------------------|
| PASTOR / CHURCH LEADER NAME (<input type="checkbox"/> MR <input type="checkbox"/> MRS <input type="checkbox"/> MS <input type="checkbox"/> DR) | | HOW LONG HAVE YOU KNOWN THE CANDIDATE? | |
| TITLE / POSITION | | CHURCH IN WHICH YOU SERVE | |
| STREET ADDRESS | | | |
| CITY | STATE | ZIP | DAYTIME PHONE NUMBER |

Reference Letter

I am pleased to recommend _____ for membership in The National Association of Christian Financial Consultants (NACFC). I understand that the mission of the NACFC is "To provide fellowship and educational resources for Christian professional financial consultants seeking to integrate Biblical-based principles within their financial consulting practices". I feel that he/she would greatly benefit from participating in the NACFC and the programs you offer.

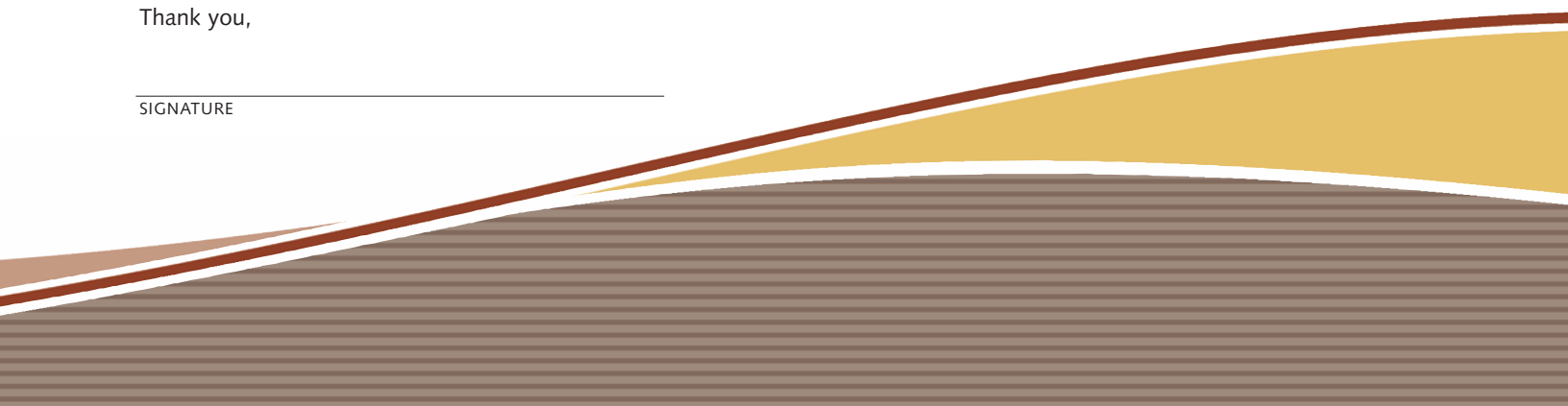
He/she has been a member in good standing of our church and I can attest to his/her strong moral character. His/her "walk" and "talk" reflect true Christian behavior.

I have checked the following areas that reflect his/her personal traits and church involvement: *(mark all that apply)*

- | | |
|--|--|
| <input type="checkbox"/> ATTENDS CHURCH REGULARLY | <input type="checkbox"/> DEMONSTRATES FINANCIAL RESPONSIBILITY |
| <input type="checkbox"/> INVOLVED IN CHURCH ACTIVITIES | <input type="checkbox"/> DEMONSTRATES FAMILY INVOLVEMENT |
| <input type="checkbox"/> A LEADER IN THE CHURCH | <input type="checkbox"/> OTHER: _____ |

Thank you,

SIGNATURE



ENHANCED DIRECTORY



In addition to having your contact information listed in the online directory, you may wish to have an additional link directing investors to your exclusive page containing more specifics about you and your business. You may also link directly to your enhanced page (see example: www.nacfc.org/Directory/page-directory-enhanced.htm)

Please return this optional form along with your payment of \$45 (billed annually) to:
1055 Maitland Center Commons, Maitland, Florida 32751
FAX: (407) 644-4574

About You

Please complete any information you would like to be included in your enhanced listing.

| | | |
|---|------------------------|---|
| FULL NAME (<input type="checkbox"/> MR <input type="checkbox"/> MRS <input type="checkbox"/> MS <input type="checkbox"/> DR) | | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| TITLE (<i>President, Registered representative, etc.</i>) | | INCLUDING PHOTOS? (<i>Please e-mail them to cheryl@nacfc.org</i>) |
| BROKER/DEALER (<i>If Applicable.</i>) | | PROFESSIONAL DESIGNATIONS (<i>CFP®, CLU, LUTCF, etc.</i>) |
| STREET ADDRESS | | COMPANY/FIRM NAME |
| CITY | STATE | ZIP |
| DAYTIME PHONE NUMBER | TOLL FREE PHONE NUMBER | FACSIMILE NUMBER |
| E-MAIL ADDRESS | | WEB SITE |
| <input type="checkbox"/> AK <input type="checkbox"/> CA <input type="checkbox"/> DE <input type="checkbox"/> IA <input type="checkbox"/> KS <input type="checkbox"/> MD <input type="checkbox"/> MO <input type="checkbox"/> ND <input type="checkbox"/> NM <input type="checkbox"/> OK <input type="checkbox"/> SC <input type="checkbox"/> UT <input type="checkbox"/> WI | | <input type="checkbox"/> NV <input type="checkbox"/> OR <input type="checkbox"/> SD <input type="checkbox"/> VA <input type="checkbox"/> WV |
| <input type="checkbox"/> AL <input type="checkbox"/> CO <input type="checkbox"/> FL <input type="checkbox"/> ID <input type="checkbox"/> KY <input type="checkbox"/> ME <input type="checkbox"/> MS <input type="checkbox"/> NE <input type="checkbox"/> NY <input type="checkbox"/> PA <input type="checkbox"/> TN <input type="checkbox"/> VT <input type="checkbox"/> WY | | <input type="checkbox"/> AR <input type="checkbox"/> CT <input type="checkbox"/> GA <input type="checkbox"/> IL <input type="checkbox"/> LA <input type="checkbox"/> MI <input type="checkbox"/> MT <input type="checkbox"/> NH <input type="checkbox"/> OH <input type="checkbox"/> RI <input type="checkbox"/> TX <input type="checkbox"/> WA |
| <input type="checkbox"/> AZ <input type="checkbox"/> DC <input type="checkbox"/> HI <input type="checkbox"/> IN <input type="checkbox"/> MA <input type="checkbox"/> MN <input type="checkbox"/> NC <input type="checkbox"/> NJ | | <input type="checkbox"/> ALL 50 STATES |

STATE REGISTRATIONS

Personal Biography

SHARE YOUR PERSONAL TESTIMONY OR PERSONAL HISTORY: (*PLEASE PRINT or e-mail text to cheryl@nacfc.org. There is no word limit, within reason.*)

About Your Practice

DESCRIBE YOUR BUSINESS PRACTICE: (*PLEASE PRINT or e-mail text to cheryl@nacfc.org. There is no word limit, within reason.*)

BROKER/DEALER DISCLAIMER (*If applicable*)

YES NO NOT REQUIRED

THIS INFORMATION HAS BEEN REVIEWED & APPROVED BY MY COMPLIANCE DEPARTMENT.

Licenses, Certifications & Affiliations

SECURITIES LICENSES

- Stocks and Bonds _____
- Mutual Funds _____
- Commodities / Futures _____

INSURANCE LICENSES

- Life Insurance Fixed Annuities
- Health / Disability Insurance Variable Annuities
- Property / Casualty

ASSOCIATIONS & OTHER AFFILIATIONS

- National Association of Christian Financial Consultants
- Certified Christian Financial Consultants
- Certified Instructor for Biblical Stewardship Seminar Series
- National Association of Personal Financial Advisors
- Society of Financial Service Professionals
- National Association of Insurance and Financial Advisors
- American Institute of Certified Public Accountants
- Certified Mortgage Planning Specialist Institute
- _____

Charges and Compensation

ADVISER-CONTROLLED CHARGES

- Fee for Financial Planning (initial, hourly, and/or retainer)
- Fee based on percentage of assets managed
(percentage ranges _____% - _____%)

CHARGES NOT SET BY ADVISER

- Commissions
- Trail Fees
- Redemption Fees
- Account Fees
- _____

Spoken Languages

- _____ _____
- _____ _____
- _____ _____
- _____ _____

Payment Method

- ANNUAL CHARGE** \$45.00
Late payments may incur an additional charge for reinstating your listing.
- Check or Money Order (enclosed)

CREDIT CARD NUMBER

SECURITY CODE EXPIRATION DATE

- Visa
- Master Card
- Auto Renew (01/31)

Areas of Specialty

(SELECT ALL THAT APPLY)

- Annuities
- Arbitration and Mediation
- Asset Allocation, Management, and Protection
(investment planning)
- Biblical Investing
(investment screening for moral issues)
- Banking
(investment banking, mortgage banking, trust management)
- Budgeting/Cash & Debt Management
(credit use, protection of assets)
- Business Planning
(large/small business, family owned, buy/sell agreements)
- Charitable and Planned Giving
- Comprehensive Financial Planning
- Corporate Finance
- Divorce Planning
- Education Planning
- Elder Issues
(long-term care, pre-mortem planning)
- Employee Benefits
(qualified plans, defined contribution plans, 401k plans)
- Estate Planning
- Financial Products
(books, software)
- Government and Military Clients
- Insurance
(risk management, disability insurance)
- International Planning
(dual citizenship, international investments)
- Irregular Income Planning
(commissions, income from stocks & bonds)
- Life Planning
- Limited Partnerships
- Medical & Health Issues
- Mutual Fund Investing
- Real Estate
- Retirement Planning
- Securities
- Stocks and Bonds
- Sudden Wealth
- Tangible Assets
(rare coins, art, collectibles)
- Tax Planning
- Women's Issues

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Christian Financial Consultants
1055 Maitland Center Commons
Maitland, FL 32751

(407) 644-9793

(877) 966-2232

info@nacfc.org

www.nacfc.org