

Membership for the Wealth Management Community



NMS FAMILY OFFICE FORUM MEMBERSHIP

MEMBERSHIP WILL BE REQUIRED TO ATTEND THE NMS FAMILY OFFICE FORUM.

Over the past 12 months, we have worked closely with our key relationships in the Family Office Community conducting research on industry trends and exploring the needs and priorities of families. Our research tells us that family office professionals consider NMS Forums to be an important resource in assisting the families to manage their investment portfolios. The non-commercial environment, the unbiased nature of the programming, the knowledge exchange among peers, and the ability of NMS to continually showcase cutting-edge investment ideas and concepts from leading thinkers are all hallmarks of NMS Forums. We envision that a network of peers established through membership will build an even stronger platform for education and intellectual advancement. The NMS Family Office Forum program content will remain unbiased, and speakers will be invited based on research independent from NMS membership.

NMS membership will be required for both family members and advisors to gain access to our forum. This approach will allow NMS to preserve the integrity of our forums over the long-term. One membership is required per family or service provider in order to register for upcoming events. Membership for service providers will be limited.

FAMILY OFFICE/HIGH-NET-WORTH INDIVIDUAL MEMBERSHIP

By elevating our annual Forum to a membership platform, NMS can provide a higher quality event with a greater sense of community for families and an access to high quality service providers who can offer solutions and services in a variety of specialties upon request. We expect Membership for our Family community to yield benefits for investors similar to other NMS investor platforms. We find that our memberships generally attract organizations who demonstrate a commitment to quality service in the industry, and who value long-term relationships. Membership access for families and service provider firms is by application.

SERVICE PROVIDER MEMBERSHIP

Service Provider membership is being designed to encompass a broad-cross section of firms who serve family offices and High-Net-Worth Investors. The Membership will include a variety of advisor firms dedicated to the family office community as well as a range of consultants and investment managers across strategies and regions of the globe. NMS provides the opportunity for relationship development in a non-commercial setting. NMS Membership is appropriate for firms who provide high quality services to Families and whose own mission and approach to business is aligned with the NMS requirement of non-solicitation.

Member firms will benefit from greater presence in the family office community and will be one of a small number of service providers in an exclusive family community. Member firms will gain access to our Forum and have benefits that promote awareness of their firms' products and services among families in the NMS community. These benefits will include periodic communications from NMS about member firms to Family members. Service provider membership will be capped at a maximum of fifty firms. Thus the ratios of family attendees to service providers will be extremely favorable for all members. Founding members will be given preference for membership in 2013, provided that all member protocols have been respected. Each service provider member may send one representative to the meeting—and is requested to be a product specialist. Once your request is received we will forward materials regarding our formal application process.

The NMS Family Office Forum is a great venue for education, investment insights, and networking with other families. We have benefited from access to knowledge of what other families are doing, explanations of innovative financial strategies, and stimulating presentations from global experts on political and economic matters.
— Conley Brooks, Jr.,
President, Sawmill Private Management, Inc.



NMS Membership Request for Service Providers



MEMBERSHIP FOR SERVICE PROVIDERS

NMS reserves the right to qualify all attendees under this option. Payment must be received from the qualifying institution. If interested in Family Office Forum Membership, please fill out the form below. *Once received, your application is subject to review.*

NAME OF FIRM _____ PRINCIPALS _____

TYPE OF FIRM _____ POSSIBLE REPRESENTATIVES _____

REGIONS COVERED _____

FUNDRAISING Y N _____ SIZE OF FIRM – AUM _____

OBJECTIVES FOR BECOMING A MEMBER _____

ADDRESS _____

STREET _____ CITY _____

STATE/PROVINCE/COUNTRY _____ ZIP/POSTAL CODE _____

PHONE _____ FAX _____

EMAIL _____

SIGNATURE _____

The above application must be filled out in its *entirety* to be deemed complete. Submit by fax to 516-933-3705 or email to info@nmsmanagement.com

To request more information about NMS Family Membership

By phone: 516-933-3700

By email: info@nmsmanagement.com

Cancellation Policy

The membership fee is non-refundable. There are no full or partial refunds if your organization cannot attend the Family Office Forum. In addition, NMS reserves the right to revoke, without refund or credit, the membership of any member who fails to abide by the terms and conditions of membership.