

ONE VOICE. ONE VISION. ONE RESOURCE.



MEMBERSHIP APPLICATION

Associate Members

Our strength is your SUCCESS. With a dedicated team of policy and advocacy experts, we drive legislation and regulation to ensure your business is able to operate at its full potential. We support members' success in our dynamic, evolving industry through education, research, information and events. Our member resources are must-have tools that are an investment in the success of your team and your business.

MBA.ORG/JOIN

MBA[®]

MORTGAGE BANKERS ASSOCIATION

Associate Members

Membership Year: October 1, 2024–September 30, 2025

Associate Members are defined as businesses that provide support services or products to the real estate finance industry. Companies that originate, service, invest in, securitize or insure mortgages are designated as regular members and are not eligible for Associate Membership.

MBA membership is corporate and does not extend to parent companies, subsidiaries, sister companies or divisions operating under a different entity name unless those entities also obtain MBA membership. Dues to MBA are not deductible as a charitable contributions but may be deductible in part as an ordinary and necessary business expense. Because MBA engages in lobbying activities on behalf of its members, the portion of dues allocated to MBA's lobbying, as defined by the IRS, is not deductible. For 2025, the non-deductible portion of the dues is 10 percent. Consult your tax advisor for additional information.

To join MBA as an Associate Member, complete pages 1-4 and submit as noted on page 4. Questions? Contact Member Services at (800) 793-6222 (select option 1) or visit MBA.org/HelpDesk.

Membership Level (please check one)

- | | | |
|-----------------|--|---|
| Premier | <input type="checkbox"/> One Year: \$12,000 | <input type="checkbox"/> Two Years: \$20,000 |
| Select | <input type="checkbox"/> One Year: \$6,000 | <input type="checkbox"/> Two Years: \$10,000 |
| Standard | <input type="checkbox"/> One Year: \$3,000 | <input type="checkbox"/> Two Years: \$5,000 |

Please refer to the Benefits Overview in this packet for level descriptions.

Payment Information

Membership dues are non-refundable

Credit Card (MBA accepts credit card payments up to \$25,000)

- VISA
 Master Card
 American Express
 Discover
 ACH Information (Proceed to form on next page)
 Check Enclosed (Make payable to: Mortgage Bankers Association)
 Bank Transfer (Include copy of transfer receipt)

Card Number

Expiration Date

CSC Code

Name as it Appears on Card

Signature (required)

- I certify that all data provided is correct to the best of my knowledge. The undersigned hereby applies for membership in the Mortgage Bankers Association and affirms that the applicant is in accord with and conducts business in conformity with the purposes of the MBA Canons of Ethics.

Company Name

Member Number

Completed By (print)

Phone Number

Date

Signature (required)**

- ** By signing this application for membership in the Mortgage Bankers Association, you consent for you and your company's employees to receive direct mail, emails, faxes, and other electronic communications related to MBA membership events, and to products and services of MBA, our affiliates, our affinity partners, and other select third parties.

Where to Submit

Express Mail Payments

(Check Only)

Mortgage Bankers Association
 ATTN: Lockbox 791419
 1000 Stewart Ave
 Glen Burnie, MD 21061

Regular Mail Payments

Mortgage Bankers Association
 P.O. Box 791419
 Baltimore, Maryland 21279-1419

Bank Transfer

Call (800) 793-6222,
 select option 1.

Email

Send to: join@mba.org

For assistance, contact
 MBA's Member Services at
 (800) 793-6222, select option 1
 or visit MBA.org/HelpDesk.

Tax ID# 36-1505650

For Staff Use Only: 20FOR12 2-Yr.

ACH Payment Instructions

To ensure credit to your account, please complete the following information form and email to Kathryn Butler, Staff Accountant, at kbutler@mba.org before sending your ACH payment. Please include supporting documentation for proper processing (i.e. copies of invoice(s), applications, or registration forms of items paid).

Company Name

Contact Person

Phone Number

Street Address

City

State

Zip

Banking Institution

Banking Institution Street Address

City

State

Zip

Invoice or Order Number

Total Payment Amount

Mortgage Bankers Association ACH Information

Receiving Institution Name:	Truist 214 N. Tryon Street Charlotte, NC 28202
Account Name:	Mortgage Bankers Association
Account Type:	Checking
Account Number:	53026776
Routing Number:	021052053

MBA does not pay for wiring and or transfer fees. Please keep in mind that some banking institutions charge transmittal or processing fees. The originating company must pay transmittal fees. International transfers must account for exchange rate to USD.

RETURN ALL COMPLETED FORMS (PAGES 1-10).

Company Information

Company Name		Year Organized	
Street Address	City	State	Zip
Phone		Website	

Which sector(s) of the real estate industry do you serve? (Check all that apply.)

- Residential
 Commercial
 Multifamily
 Investor

Select Primary Company Type:

- Law Firm
 Professional Services Provider
 Technology Solution Provider

Select Secondary Company Type:

- | | | |
|---|---|--|
| <input type="checkbox"/> Accounting/Audit/Tax Services | <input type="checkbox"/> Education/Training | <input type="checkbox"/> Quality Assurance/Quality Control/Review Services |
| <input type="checkbox"/> Appraisal Services | <input type="checkbox"/> Hardware Solutions | <input type="checkbox"/> Risk Management |
| <input type="checkbox"/> Compliance Services | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Software/App/API Development |
| <input type="checkbox"/> Consulting/Outsourcing | <input type="checkbox"/> Insurance Services | <input type="checkbox"/> Technology Company |
| <input type="checkbox"/> Credit Reporting Company | <input type="checkbox"/> Investment/Portfolio Management | <input type="checkbox"/> Title/Settlement/Escrow Services/Real Estate Broker |
| <input type="checkbox"/> Data Analytics | <input type="checkbox"/> Legal Services | <input type="checkbox"/> Valuation Services (Asset) |
| <input type="checkbox"/> Default Services | <input type="checkbox"/> Marketing/Advertising/Public Relations | <input type="checkbox"/> Valuation Services (Income) |
| <input type="checkbox"/> Document/Records Management | <input type="checkbox"/> Mortgage Origination Process | |
| <input type="checkbox"/> Documentation Management and Processing Services | <input type="checkbox"/> Publisher | |

Primary Contact

The primary contact serves as the company's membership coordinator. The primary contact receives all corporate membership related communication, including receipts, renewal documents, etc., and has online access to manage the corporate roster, subscriptions, etc.

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Secondary Contact

The secondary contact also receives renewal communication and has online access to manage the company membership.

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Staff

Your company's membership extends to your company's staff. Individuals linked to a company membership receive relevant communications related to industry activities and MBA programs and services, as well as discounts on conferences, products, and services. Use the form below to add key individuals to your company membership roster.

Functional Role: Chief Executive Officer

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Functional Role: Executive Assistant to CEO

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Functional Role: Head of Residential Lending

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Functional Role: Head of Compliance

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

Functional Role: Head of Servicing (if applicable)

Name Mr. Mrs. Ms.		Title	
Phone (optional)		Email	
Street Address (if different than company address)	City	State	Zip

APPLICATION

Functional Role: Chief Financial Officer

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Functional Role: Head of Human Resources

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Functional Role: Head of Training and Development

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Functional Role: Head of Diversity, Equity & Inclusion

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Functional Role: Head of Credit Risk

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Functional Role: Head of Government Relations

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

APPLICATION

Functional Role: Head of Information Technology

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Additional Staff Listing

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Additional Staff Listing

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Additional Staff Listing

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Additional Staff Listing

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Additional Staff Listing

Name Mr. Mrs. Ms. Title

Phone (optional) Email

Street Address (if different than company address) City State Zip

Associate Member Benefits

	PREMIER (\$12,000)	SELECT (\$6,000)	STANDARD (\$3,000)
ACCESS			
Invitation to join MBA's Mortgage Technology Vendor Working Group	✓	✓	✓
Participation on policy committees, working groups and councils	✓	✓	
Access to nearly 150,000 mortgage banking professionals via the online Membership Directory	✓	✓	✓
Targeted member postal mailing lists	✓ (4x/yr)	✓ (2x/yr)	
Invitation to attend key leadership receptions at MBA's Annual and CREF Conventions and Secondary Conference	✓		
Invitation for your CEO to attend our exclusive Chairman's Conference	✓		
Invitation to sponsor MBA's Mid-Winter Housing Finance Conference	✓		
EXPOSURE			
Considered participation in "Demo Days" featuring live demonstrations of provider solutions	✓	✓	✓
Members are celebrated on MBA's LinkedIn platform (80,000+ followers) through "Employee Recognition" posts showcasing individual achievements such as promotions, awards, professional milestones, and more	✓	✓	
Receive quarterly recognition for your company across all MBA social media platforms (150,000+ followers)	✓	✓	✓
Company listing in online Vendor Marketplace (search filter appears in order of member tier)	✓	✓	✓
Participate in the Member Discount Program by adding special pricing that you offer exclusively for MBA members to your Vendor Marketplace listing	✓	✓	✓
Company listing in online Membership Directory	✓	✓	✓
Consideration for speaking opportunities at MBA conferences	✓	✓	✓
Membership level recognition in MBA NewsLink 4x/yr (50,000+ subscribers each time)	✓	✓	
Membership level recognition via signage at MBA's Annual and CREF Conventions and Servicing Conference	✓	✓	
Opportunity to post white papers on MBA website	✓		
Company profile in MBA NewsLink 1x/yr (50,000+ subscribers)	✓		
Complimentary banner ad on select pages of the MBA website	✓		
SAVINGS			
Member pricing for all conferences and education programs	✓	✓	✓
Member pricing on exhibits and sponsorship opportunities	✓	✓	✓
Member pricing on select research products	✓	✓	✓
Member pricing on advertising opportunities	✓	✓	✓
Discounts on business products and services through the Member Advantage Program	✓	✓	✓
Sixteen complimentary self-study education courses	✓	✓	✓
Complimentary live webinars and previously recorded webinars	✓	✓	✓
INFORMATION			
Access to MBA staff experts	✓	✓	✓
Complimentary subscriptions for all staff to MBA NewsLink	✓	✓	✓
Complimentary access to MBA's CREF Forecast Report	✓	✓	
Complimentary access to 15 residential research reports and surveys	✓	✓	✓
Complimentary Chart of the Week	✓	✓	✓

* For single-person operated companies only.

Dues to MBA are not deductible as a charitable contribution but may be deductible in part as an ordinary and necessary business expense. Because MBA engages in lobbying activities on behalf of its members, the portion of dues allocated to MBA's lobbying, as defined by the Internal Revenue Service, is not deductible. **For 2025, the non-deductible portion of the dues is 10 percent.** Consult your tax advisor for additional information.

MORPAC Authorization

I authorize MORPAC, the political action committee of the Mortgage Bankers Association (“MBA”) of which the above referenced enterprise is a member, to solicit contributions from myself and the executive and administrative employees and shareholders of my company (those paid on a salary basis and have policymaking, managerial, professional, or supervisory responsibilities). The authorization is effective for the years indicated below.

<input type="checkbox"/> 2025	_____	_____	_____
	Signature	Name (Print)	Date
<input type="checkbox"/> 2026	_____	_____	_____
	Signature	Name (Print)	Date
<input type="checkbox"/> 2027	_____	_____	_____
	Signature	Name (Print)	Date
<input type="checkbox"/> 2028	_____	_____	_____
	Signature	Name (Print)	Date

Contributions to MORPAC are used to support candidates to federal office. MORPAC may only solicit contributions from certain restricted classes of individuals. MORPAC is required to obtain written member company authorizations prior to soliciting individuals on the basis that they are eligible member employees or shareholders.

Member authorizations are designated by year; multiple year authorizations are permitted at one time. A company may authorize only one trade association PAC each year to solicit permitted employees.

A MORPAC representative will contact you to receive your permission prior to soliciting any of your employees or shareholders pursuant to this authorization. The above signatory is authorized to provide MORPAC with this solicitation authorization.

MBA Canons of Ethics

1. Professionalism

Members conduct their business in a professional manner, ensuring that their personnel are knowledgeable in the areas of real estate finance in which they participate and are acting in compliance with sound industry practices.

2. Integrity and Confidentiality

Members act in a manner that recognizes that integrity and confidentiality are essential in the real estate finance industry.

3. Public Trust

Members do not commit fraud or misrepresentation against the public and do endeavor to protect the public against fraud, misrepresentation and unethical practices in the real estate finance business. Members help eliminate or prevent practices which could be damaging to the public or to the integrity of the real estate finance industry.

4. Fiduciary Responsibilities

Members maintain and use money or property held on behalf of others in a prudent, identifiable manner and for the purposes such were received.

5. Disclosure of Information

Members provide accurate, timely and meaningful information to those with whom they do business.

6. Conflicts of Interest

Members disclose any financial or other conflicts of interest.

7. Compliance with Laws

Members act in conformity with applicable laws and regulations, including but not limited to antitrust, data security, and anti-discrimination laws, and cooperate in every appropriate way with governmental bodies.

8. Non-discrimination

Members conduct their business without regard to race, color, sex, religion, marital status, national origin, age, or any other protected class status of the persons with whom they deal.

9. Honesty in Advertising

Member advertisements and solicitations accurately describe products and services, using clear, simple, truthful and understandable statements.

10. Sanctity of Agreements

Members do not breach or avoid an agreement or commitment, whether written or oral.

11. Competition

Members support healthy competition in the real estate finance industry.

12. Ethics Compliance

Members and their employees engaged in real estate finance are familiar with and comply with these Canons. Members cooperate, promptly and in good faith, with any investigation related to compliance with these Canons. Failure to cooperate may result in suspension from or termination of membership.