




 203 W 10TH St., Austin, TX 78701

 512-472-7391

 www.texasbankers.com/trust

MEMBER BENEFITS

WHAT WE DO



EDUCATION

Continuing education credits and significant discounts on all programs to develop and refine the professional tools needed to stay informed and competitive with our schools, seminars, conferences and convention.



INFORMATION

Receive current information about industry trends, regulations and pending legislation. We also offer a menu of professional reference publications.



ADVOCACY

We ensure your interests are heard and protected through our proven advocacy efforts.

New outreach initiatives promote the use of professional fiduciaries with centers of business influence and attract and retain a talented workforce. Members reap the benefits of this outreach and a more favorable position for our industry.

ABOUT US

We are a one-of-a-kind state organization dedicated to serving the unique needs of wealth management and trust companies and professionals. For more than 100 years, we have provided tailored education, information, advocacy, outreach and professional networking for our members. Today, more than ever, that translates into membership value.

We also offer interested students affordable memberships to provide a unique understanding of our profession and a leg up on competition for related jobs.

As a member of WM&T, you gain access to a variety of discounted benefits that help you stay informed, competitive, and connected in the industry.



COMPLIANCE
ALLIANCE



COMMUNITY BANK INNOVATION
MAGNET
Tech Built on a Trusted Foundation

TBA Services Company
LINKING BANKS WITH QUALITY PROVIDERS

[Student Membership](#)

ACTIVE MEMBERSHIP DUES SCHEDULE

IN-STATE MEMBERSHIP DUES

Any national or state financial institution or trust company authorized to exercise fiduciary powers Texas.

Total Managed Trust Assets Dues

\$0 – 20 million	\$900
\$20 – 100 million	\$1,250
<i>+ \$8 per million over 20 million</i>	
\$100 – 200 million	\$1,770
<i>+ \$4 per million over 100 million</i>	
\$200 – 500 million	\$2,290
<i>+ \$2 per million over 200 million</i>	
\$500 million – 1 billion	\$3,520
<i>+ \$1 per million over 500 million</i>	
\$1 – 3 billion	\$4,770
<i>+ \$.50 per million over 1 billion</i>	
\$3 billion and over.....	\$9,250
<i>+ \$.40 per million over 3 billion</i>	

(Shall not exceed \$10,000)

OUT-OF-STATE MEMBERSHIP DUES

Any national or state financial institution or trust company exercising fiduciary powers outside Texas and having no substantial trust operation within Texas.

Total Managed Trust Assets Dues

\$0 – 200 million	\$900
\$200 – 500 million	\$1,100
<i>+ \$2 per million over 200 million</i>	
\$500 million – 1 billion	\$1,700
<i>+ \$1 per million over 500 million</i>	
\$1 – 3 billion	\$2,300
<i>+ \$.50 per million over 1 billion</i>	
\$3 billion and over.....	\$4,500
<i>+ \$.40 per million over 3 billion</i>	

STUDENT MEMBERSHIP

Students who are enrolled in a program from a TBA University partner are welcome to enroll in TBA's student membership for free during the duration of the individual's undergraduate or MBA studies. [Click here for more information and to join today!](#)

MEMBERSHIP INFORMATION

Full Name Mr. Ms.

Title

Institution / School

Area of Trust / Major & Minor

Physical Address (City / State / Zip)

Mailing Address, if different from above (City / State / Zip)

Phone

E-mail

Federal tax law prohibits the deduction of lobbying expenses for federal income tax purposes. Organizations like TBA, which assess member dues, are required by law to notify their members of the portion of their dues attributable to lobbying and therefore non-deductible on your federal tax return. For the year June 1, 20XX, through May 31, 20XX, it is estimated that XX% of your dues will be attributable to lobbying as defined by the IRS. Contributions to TBA are not charitable contributions; however, they may be deductible as legitimate business expense.

PLEASE RETURN TO: Wealth Management & Trust • 203 W. 10th Street • Austin, Texas 78701

or e-mail to trust@texasbankers.com

512-472-7391 • WWW.TEXASBANKERS.COM/TRUST