

THE CENTER
for
WEALTH & LEGACY
Connect – Inspire - Challenge

ADVISORY TEAM MEMBER AGREEMENT

FUNDRAISING

I agree to raise \$500 or more in cash sponsorship (in-kind sponsorships are credited at 50% of value contributed if at least 50% of the sponsorship is in cash) for the Center each year, either by soliciting donations from others, by personal contributions, or by any combination of the two.

EVENT PARTICIPATION

I agree to purchase my tickets for the Leadership, Legacy & Inspiration Awards™ and the four Business Legacy Mentoring Series events, and pay the discounted price of \$150 for my personal seminar tickets within 30 days of becoming a board member. (Ticket prices are \$265 if purchased separately and at normal price.) On line registration may be made at: <https://www.registrationfactory.com/v3/?EventUUID=D608E084>

RETREATS

I agree to make “best efforts” to attend at least one of the two normally scheduled Board retreats each year.

SEMINAR ATTENDANCE

I agree to make “best efforts” to attend the Leadership, Legacy & Inspiration Awards™ event and at least two of the four Business Legacy Mentoring Series events held each year.

SEMINAR INVITATIONS

I agree to invite at least 35 persons to each seminar, who shall be persons of influence, clients, prospective clients or others who are exceptional individuals with a heart to make a positive difference in the community.

COMMITTEE PARTICIPATION

I am willing to serve on at least one of the following Active committees for either the *Leadership, Legacy & Inspiration Awards* (LL&IA) or the *Business Legacy Mentoring Breakfast Series* (BLM) described in Exhibit A: (please indicate choice(s) below)

<u>LL&IA</u>		<u>BLM</u>
_____	Operations Committee	_____
_____	Sponsorship Committee	_____
_____	Marketing Committee	_____
_____	Programming Committee	_____
_____	Facilitator Committee	_____

COMMITTEE MEETING PARTICIPATION

I agree to participate in at least 75% of the committee meetings according to the schedule determined by the specific sub-committee chair.

SERVICE PROJECTS

I agree to volunteer for at least one service project organized or sponsored by the Center during each year.

INSPIRATIONAL AWARD NOMINATIONS

I agree to nominate at least three businesses and/or individuals for consideration of an Inspiration Awards, and make a best effort to attend the selection luncheon prior to the Inspiration Awards event.

TERM OF SERVICE

I understand that my term of service on the Board of Advisors is for 12 months after acceptance on to the Advisory Team. Reappointment to the board is subject to approval by the majority of existing board members.

AGREED

DATE: _____

Print/Type Name _____

Please return the signed Agreement to Lydia Monchak at Lydia@wealthlegacycenter.org

COMMITTEE DESCRIPTIONS

Center committees described as:

- Operations Committee:
 1. Define and update the governance of the Center
 2. Ensure that the UCP guidelines are followed i.e. create event budgets and notifications of upcoming events
 3. Create, amend, and track agreement letters with Advisory Team members
 4. Create and maintain operation “details” of The Center (e.g., maintaining and updating *Mission Statement, Vision Statement, elevator talk*)
 5. Organize the bi-annual Retreats – coordinate with Executive Chair the agenda, invitations, location, dates
 6. Act as liason for event planning for venue, insurance, catering, outside services
 7. Provide technical support at events
 8. Host and maintain the Center website
 9. Generally meet twice a year or as requested by the Operations Committee Chair

- Sponsorship Committee:
 1. Direct recruitment of members for participation in the Advisory Team and Committees.
 2. Identify and call upon potential sponsors
 3. Maintain and update sponsorship benefits as listed on the Center website
 4. Facilitate and interact with sponsors to collect their logo and their other info to put on to our website
 5. Encourage sponsors to be a part of our sponsored blogs
 6. Indentify groups and organizations to develop strategic partnerships with
 7. Create ideas for generating direct donations
 8. Create social events to invite and connect prospective advisory team and sponsors i.e. create relationships
 9. Generally meet four times a year or as requested by the Fundraising Committee Chair

- Marketing Committee:
 1. Coordinate and maintain the master distribution list of event attendees i.e. who to invite/thank/reach out to
 2. Encourage and maintain the Community calendar page
 3. Create & insure marketing materials are printed for events
 4. Identify Advertising and Branding opportunities
 5. Identify business development opportunities
 6. Identify value added ideas for our events
 7. Promote & Coordinate Social Media campaigns
 - a. Linked In
 - b. Twitter
 - c. Facebook
 8. Create a schedule to keep our blog fresh and current
 9. Generally meet four times a year or as requested by the Marketing Committee Chair

- Programming Committee
 1. Identify and reach out to prospective speakers
 2. Create the content for the annual Leadership, Legacy and Inspiration Awards™ and/or the quarterly Business Legacy Mentoring™ Breakfast Series
 3. Ensure dates are vetted against other community events
 4. Create a timetable for the event
 5. For Inspiration Awards, coordinate nominations and communicate with nominees
 6. For Inspiration Awards, coordinate the voting of Award Honorees
 7. Make the events memorable with gifts for audience and speakers
 8. Generally meet monthly, twice during the month of the event or as requested by the Programming Committee Chair

- Facilitator Committee
 1. Lead breakout sessions i.e. Ask good questions to promote discussion at tables
 2. Keep table discussions on track
 3. Discern speaker's facts from interpretation
 4. Encourage others in the group discussion to participate
 5. Review handout materials
 6. Encourage feedback
 7. Follow up on feed back after events
 8. Generally meet four times a year or as requested by the Facilitator Committee Chair