



**CHART EXCHANGE
APPLICATION FOR CHARTER MEMBER
VENDOR PARTNERS**

NOTE: All information will be treated as confidential. No specific details regarding your program will be released to anyone without your prior authorization.

SUBMIT COMPLETED APPLICATIONS TO: INFO@CHART-EXCHANGE.COM

GENERAL INFORMATION

Vendor Name: _____

Street Address: _____

City: _____ **State:** _____ **Zip:** _____

Primary Contact: _____

Phone: _____

E-Mail Address: _____

Company Website: _____

List the individuals from the firm that will be active participants in CHART:

1. _____
2. _____
3. _____
4. _____
5. _____

First-year member dues include one free registration to the 2016 CHART October Event in Baltimore MD. Who should be registered? _____

APPLICANT OPERATIONS

Describe the product(s) or service(s) the applicant firm wishes to promote to the CHART Exchange membership (provide copies of marketing materials or other supporting documentation as necessary).

How does the product(s) or service(s) provided by the applicant firm differ from others offered in the marketplace?

Provide 3 references of insurance agencies that have used the applicant firm's product(s) or service(s) in the past

- 1. **Company:** _____
Contact Name: _____
Telephone: _____ **E-Mail:** _____

- 2. **Company:** _____
Contact Name: _____
Telephone: _____ **E-Mail:** _____

- 3. **Company:** _____
Contact Name: _____
Telephone: _____ **E-Mail:** _____

APPLICANT EXPECTATIONS

What aspects of the CHART Exchange appeal to the Applicant firm (check all that apply)?

- | | |
|--|--------------------------------|
| Networking with potential clients | Learning/honing new skills |
| Presenting capabilities to members | Cross-sell potential |
| Identifying new business opportunities | Open new distribution channels |
| Expansion into international markets | Support an industry group |
| Other (Specify): _____ | |

What are the top three benefits the Applicant firm expects to derive from it's membership?

- 1. _____
- 2. _____
- 3. _____

The foundation of the CHART concept has been built on the definition of the word “Exchange” – to give something of value to obtain something of greater value. How will the Applicant support CHART (check all that apply)?

Attend CHART-sponsored meetings
Participate in sub-committees
Moderate a workshop
Reserve a vendor table at CHART events
CHART Goes to London (CGL)
(Scheduled for May 2016)

Volunteer for Advisory Board
Assist in new member recruitment
Participate in a vendor panel
Advertise in CHART Magazine and/or
the Exchange website
Sponsor one the CHART meeting
activities

Other (Specify): _____

Does the Applicant firm wish to become a Preferred Vendor Partner? Yes No
Those interested will be contacted by a member of the CHART Exchange staff.

By signing below, the Applicant firm:

1. Attests that all of the information provided in the membership application is accurate.
 2. Agrees to treat other members in accordance with the CHART Bill of Rights
 3. Agrees to abide by the CHART Exchange by-laws
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Signed by:

Applicant Representative

Date

Membership dues for Vendor Partners are \$5,000 per year. The first year membership fee includes one registration for the upcoming 2016 CHART Event in Baltimore MD. Vendor table fees for the fall meeting are not included as part of this offer.

Do not send payment with this form. The Applicant firm will be notified upon approval of the Application; an invoice for the membership dues will be generated at that time.