



**NEW MEMBER SPONSOR REVIEW & CHECKLIST.
PROSPECTIVE MEMBERS REVIEW PRIOR TO COMPLETION OF APPLICATION FORM.**

- _____ Explanation of initiation fees and costs. **Initiation fee of \$250.00** is non-refundable and must accompany the application. Fee covers all badges, rosters, files and membership plaques which are presented following six months of membership in good standing.
- _____ Explanation of membership dues. **\$285 per quarter** is payable in advance, includes all luncheon charges and dues. New members will be pro-rated. Dues are billed 30 days in advance and are assessed a \$75.00 late fee if after the 1st week of the second *and* third month of the quarter.
- _____ Explanation of the limits of active membership. Membership is limited to a person, firm, or corporation owning its own business. The representative shall be an **owner, officer, or manager** that has been selected by the firm. Subject to Board of Directors approval.
- _____ Explanation of timing for receipt of application and actual membership. After the application and initiation check are submitted, a reference check and visitation by the Membership committee will occur. The applicant will be presented to the BOD at its next meeting, held each month. If an application is approved it will be announced and published to the membership for two weeks. If no objections are received, the application is approved and the member will attend the next weekly meeting. **Membership** will not be official for a period of **3-7 weeks** after application is made.
- _____ Explanation of requirement to abide by the provisions of the Constitution, By-Laws, and other rules, regulations, and conditions. This will include those which may be adopted from time to time, and in particular, Article V, Section 4, as follows: *"Members are subject to expulsion by the Board of Directors for non-payment of Dues; for non-attendance at four consecutive meetings; for failing to report sufficient and satisfactory leads; for any infraction of the By-Laws or in any case where the conduct of a member is unseemly or inimical of the best interests of the group, provided that any member expelled by the Board of Directors may have the right to appeal to the membership within ten days,"*
- _____ Explanation of **confidentiality**. The **Membership Roster** and the **weekly leads produced** and published in the newsletter are confidential. They may not be reviewed with a non-member of the Association.
- _____ Explanation of Classification priorities. Any firm approved for membership in the Association is required to guarantee that **60%** of their business is applicable to their specific membership classification. If a member has "other lines" that are in conflict with another member's classification they will not publicly refer to those in introductions, brochures, or mailings.
- _____ Explanation of **membership in similar referral groups**. While a member of this Association, members shall not hold membership in another organization the purpose of which mirrors that of the Tacoma Executives Association.
- _____ Explanation of cancellation by a member. Any member not in arrears in their dues and other fees may voluntarily resign by filing a written resignation with the Board of Directors (BOD).
- _____ Explanation of "Leads". General Leads are business information that is new and not previously published, etc. A Direct Lead is business information exchanged between 2 members about someone outside the Association for **referral business**. Purchases are any business conducted between two members.
- _____ Explanation of regular **attendance**. The Board of Directors will review on a monthly basis, all members who may be non-attenders, or meeting only **60% average**. Should a new firm wish to make application for such a classification, their application would be considered for their ability to attend regularly.
- _____ Explanation of new members joining a committee in the 1st month.