



Alliance Partner Application

***** *DIAMOND* ***** ***** *GOLD* ***** *** *SILVER* ***

Thank you for your interest in the Independent Trustee Alliance! Our Alliance Partners support the ITA year round. The ITA is a non-profit professional association founded by Independent (non-corporate) Trustees serving families and family offices.

The ITA is dedicated to providing support and continuing education for members, increasing the awareness of this rising profession, and welcoming all who serve as a trustee; family members and professionals. Professional Independent Trustees, with five or more years of experience, may apply for Certification. We invite all professionals involved in the estate planning arena who seek alliances with others to better serve their clients. All are welcome!

Our Alliance Partner Program allows companies to show their commitment to raising the bar on fiduciary duty and service by providing membership in the ITA for their employees, clients and friends. Our Alliance Partners enjoy being featured on the ITA website, inclusion in our marketing efforts, and being spotlighted to ITA membership where appropriate.

Please return the completed application, which includes the Alliance Partner Agreement (see subsequent pages) to either the eMail or physical address below along with the dues payment or contact us to arrange electronic payment.

Independent Trustee Alliance
c/o Kevin Quinn, President
5250 Hwy 78 Ste 750 #403
Sachse, TX 75048
info@TrusteeAlliance.com
www.TrusteeAlliance.com

ITA ALLIANCE PARTNER APPLICATION

APPLICANT INFORMATION

Company Name:

Applicant Name:

Title:

Phone:

Business address:

City:

State:

ZIP Code:

Website:

Email:

Which type of alliance are you seeking?

☐ DIAMOND

\$5,000 Annual Dues

☐ GOLD

\$2,500 Annual Dues

☐ SILVER (Please mark with an X)

\$1,000 Annual Dues

Check must be included with application and mailed to: Independent Trustee Alliance, Attn: Kevin Quinn, 5250 Hwy 78, Ste 750 #403, Sachse, TX 75048 or call (214) 393-2268 to arrange electronic payment

WHY ARE YOU INTERESTED IN ALIGNING WITH ITA?

Please mark all that apply. Your input will help us continuously improve the Alliance Program. Thank you.

☐ Support the growth of ITA ☐ Highlight your business to ITA Membership ☐ Spotlight your business to Providers used by ITA Members

☐ Other: _____

HOW DID YOU LEARN ABOUT ITA

Please mark all that apply. Your input will help us continue to improve our outreach efforts. Thank you.

☐ LinkedIn ☐ Ad ☐ Article ☐ Personal Invitation ☐ Email ☐ Webinar ☐ Conference

☐ Other: _____

EMPLOYEES TO BE LISTED AS MEMBERS

DIAMOND: 5 Members GOLD: 3 Members SILVER: 1 Member
May be named now or at a later date

Name & Title

E-Mail Address

Phone

By signing below, I agree to adhere to the terms of the ITA Alliance Partnership Program. Individual members listed on this application or named in the future will adhere to the ITA Code of Ethics and Member Best Practices while a member of ITA. Individual membership granted via the Alliance Partnership Program is at the Associate level only. Members wishing to apply for Certification must do so through an individual application as an ad-on to their membership and pay the appropriate application fee. Membership in the ITA Alliance Partnership Program is renewable annually. Violation of this agreement may be grounds for cancellation of membership, or Alliance Partner status, at the sole discretion of the ITA Board of Directors. Applicant below agrees to be point of contact to the ITA, and to accept ITA renewal notices.

Signature of Applicant :

Date:

For internal use only: ____/____/____ Date rec'd - Alliance Confirmed ____/____/____

ITA ALLIANCE PARTNER PROGRAM

DIAMOND ALLIANCE

Annual Dues: \$5,000

INCLUDES

1. Company Logo displayed on the ITA website with link
2. Opportunity to introduce up to two webinars annually
3. 3 company employees may be listed as members
4. 2 employees have complimentary admission to annual ITA conference

GOLD ALLIANCE

Annual Dues: \$2,500

INCLUDES

1. Company Logo displayed on the ITA website with link
2. 2 company employees may be listed as members
3. 1 employee complimentary admission to annual ITA conference

SILVER ALLIANCE

Annual Dues: \$1,000

INCLUDES

1. Company Logo displayed on the ITA website with link
2. 1 company employee may be listed as a member

ITA ALLIANCE PARTNER TERMS

This agreement is annually renewable at the annual dues amount in effect at the time of renewal. Applicant agrees to be point of contact with ITA, and to alert ITA when there is a change in personnel, so ITA always has an up-to-date point of contact with your company.

Membership granted to employees is at the Associate level only.

An individual member may apply for Certification via an individual membership which includes paying the Certification fee. If the member changes employer or has their membership rescinded by their employer, the member will be responsible for paying annual dues as well as re-certification fees as applicable.

The members of ITA already receive periodic notices from the ITA, including information about our Alliance Partners, and Conference Sponsors. We discourage Alliance Partners from spamming, or otherwise selling directly to, members without the express consent of those individual members. Alliance Partners are encouraged to keep their directory listing up to date, to have the ITA logo prominently displayed on their website and email addresses, to advertise their membership and participation in the ITA on their social media outlets, to submit blog posts for our members to enjoy on the ITA website, and to prepare presentations at the Minimum Continuing Legal Education standard for webinars, and possible inclusion in our Annual Conference. Sponsorship of any kind is not a guarantee for a speaking opportunity. Alliance Partners can become Annual Conference Sponsors for separate fees and commitments.

Features and benefits may be modified from time to time. Alliance Partner applicants will be notified in writing of such changes before such changes are implemented.

We hold our Alliance Partners, Conference Sponsors, and Members to the same high standard of fiduciary duty and conduct, and the ITA Board reserves the right to rescind membership, or rescind sponsorship, with no refund, if Alliance Partners, or their invited members, are out of compliance, at the ITA Board's discretion.

The memberships granted to employees, clients, customers, and friends, may be changed by the Alliance Partner during the term of this agreement, but at no time may the number of memberships exceed the maximum for the Alliance Partner's level of membership (Diamond, Gold, Silver).

It is the Alliance Partner's responsibility to provide an electronic copy of their company logo to the Independent Trustee Alliance for use under this agreement.