



# Alliance Partner Application

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

Thank you for your interest in the Independent Trustee Alliance! The ITA is a professional association founded by Independent (non-corporate) Trustees serving families and family offices. ITA members are dedicated to providing support and continuing education for members of this rising profession and welcome those who are serving as a trustee for their family and those professionals involved in estate planning who seek alliances with others to better serve their clients. All are welcome!

Our Alliance Partner Program allows companies to show their commitment to this movement by providing membership in the ITA for their employees and clients, being featured on the ITA website and marketing material and being spotlighted to ITA membership

Please return the completed application to either the eMail or physical address below along with the dues payment or contact us to arrange electronic payment.

Richard Neely, Treasurer  
ITA  
4925 Greenville Ave  
Suite 1400  
Dallas, Texas 75206-4085  
info@TrusteeAlliance.com  
www.TrusteeAlliance.com

# ITA ALLIANCE PARTNER APPLICATION

## APPLICANT INFORMATION

Company Name:		
Contact Name:	Title:	Phone:
Business address:		
City:	State:	ZIP Code:
Website:		Email:

Which type of alliance are you seeking?

**DIAMOND**                       **GOLD**                       **SILVER** *(Please mark with an X)*  
 \$3,000 Annual Dues                      \$2,000 Annual Dues                      \$1,000 Annual Dues

*Check must be included with application and mailed to: Independent Trustee Alliance, Attn: Richard Neely, 4925 Greenville Ave., Suite 1400, Dallas, TX 75206-4085 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: 10 Members    GOLD: 5 Members    SILVER: 2 Members  
 May be named now or at a later date

Name & Title	E-Mail Address	Phone

**CLIENTS, CUSTOMERS AND FRIENDS TO BE LISTED AS MEMBERS**

DIAMOND: 10 Members      GOLD: 5 Members  
May be listed 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. 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 at the sole discretion of the ITA Board of Directors.

Signature of Applicant :	Date:
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**For internal use only: \_\_\_/\_\_\_/\_\_\_ Date rec'd - Alliance Confirmed \_\_\_/\_\_\_/\_\_\_**

# ITA ALLIANCE PARTNER APPLICATION

## DIAMOND ALLIANCE

Annual Dues: \$3,000

Includes Membership for 10 company employees

### INCLUDES

1. Company listed in Membership Directory
2. Company Logo displayed on the ITA website with link
3. Company Logo or photos listed on marketing literature
4. 10 company employees may be listed as members
5. 10 memberships to give to new members
6. Company Logo displayed on the ITA booth at trade shows
7. Opportunity to introduce speakers at ITA events
8. 2 employees have complimentary admission to annual ITA conference

### WHAT MAY BE INCLUDED IN THE FUTURE

9. May write full page article for 4 issues of ITA Newsletter
10. Discount on ITA training sessions

## GOLD ALLIANCE

Annual Dues: \$2,000

Includes Membership for 5 company employees

### INCLUDES

1. Company listed in Membership Directory
2. Company Logo displayed on the ITA website with link
3. 5 company employees may be listed as members
4. 5 memberships to give to new members
5. Company Logo displayed on the ITA booth at trade shows
6. 1 employee complimentary admission to annual ITA conference

### WHAT MAY BE INCLUDED IN THE FUTURE

7. May write half page article for 2 issues of ITA Newsletter
8. Discount on ITA training sessions

## SILVER ALLIANCE

Annual Dues: \$1,000

Includes Membership for 2 company employees

### INCLUDES

1. Company listed in Membership Directory
2. Company Logo displayed on the ITA website with link
3. 2 company employees may be listed as members
4. Company Logo displayed on the ITA booth at trade shows

### WHAT MAY BE INCLUDED IN THE FUTURE

5. May write half page article for 1 issue of ITA Newsletter
6. Discount on ITA training sessions

## ITA ALLIANCE PARTNER TERMS

This agreement is annually renewable at the annual dues amount in effect at the time of renewal.

Membership granted to employees, clients, customers and friends is at the Associate level.

An individual member may apply for Certification via an individual membership and 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.

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

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.