



2021 Membership Agreement

Conversion / Implementation Team Leader Roundtable

FIRM

Agrees to join the 2021 program of the Roundtable for the calendar year 2021 as outlined in this document

SERVICES CONTRACTED

The 2021 program is based on \$76,000 in total revenue in membership dues from all firms (20+ firms). Services will be adjusted according to the number of participating firms and overall revenue. Our membership package includes the following services provided by EACH Enterprise:

- ✓ Access to (and listing in) the EACH Enterprise online retirement plan community
- ✓ Input into Roundtable activities at a planning (and naming) committee
- ✓ 10 one-hour online meetings (2 attendees)
- ✓ 1 in-person meeting in August 2021 (2 registrations per company)
- ✓ 3 committees and reports (e.g. to solve blackout period issues, to establish rules for e-distribution consent at the time of conversion, to formulate a position on QDIA mapping strategies)
- ✓ 2 peer company polls (e.g. conversion data management and technology, timing of contracts and service agreements)
- ✓ 3 tracks (data management, small plans, client-facing and plan sponsor training)
- ✓ Posting of reports directed to CFPs and HROs on the 401(k) listening post LinkedIn page and website
- ✓ Access to (and listing in) the EACH Enterprise online retirement plan community using the Hivebrite app (access to roster of contact among other benefits)
- ✓ Your company logo and positioning statement on the website of the 401(k) listening post
- ✓ Other activities as budget allows and membership needs evolve

All member firms are expected to contribute to deliberations at meetings.

[Additional Comments or Requests](#)

MAIN CONTACTS REPRESENTING OUR FIRM

Individuals representing a firm are those with overall responsibility for the function at their firm, or a close collaborator with strategic responsibilities for the function.

Conversion Implementation Team Leader Roundtable – First Representative

First Name	M.I.	Last Name	Designations
Title			
Email address			
Office Phone		Mobile Phone	

Conversion Implementation Team Leader Roundtable – Second Representative

First Name	M.I.	Last Name	Designations
Title			
Email address			
Office Phone		Mobile Phone	

MEMBERSHIP DUES

Membership dues for 2021 are \$3800. Dues invoiced upon acceptance, on or before February 28, 2021. Payment terms are net-30 days.

Contact for Invoicing

First Name	M.I.	Last Name	Designations	
Title				
Email address			Office Phone	Mobile Phone

SIGNATURE

For EACH Enterprise	Joining Member Firm
Name	Name
Position	Position
Date	Date
Signature	Signature