



2021 Membership Agreement

Client Plan Sponsor and Advisor/Consultant Experience 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 \$96,000 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) roundtable meeting
- 18 one-hour online meetings (6 for heads of client relationship management, 6 for heads of Strategic Account Management, and 6 for heads of Client Experience)
- 1 in-person meeting in September 2021 (roundtable discussions, 3 tracks and 3 registrations)
- Client Relationship Management Sentiment Survey and Report
- 4 employer polls (\$14,000 sample budget)
- Two viewpoint papers on strategic industry issues based on committee deliberations
- Creation and maintenance of a 401(k) listening post Website
- Our company logo and positioning statement on the website of the 401(k) listening post
- Creation and maintenance of a 401(k) listening post LinkedIn page
- Posting of employer poll reports and viewpoints on the 401(k) listening post site and LinkedIn page
- Other activities as budget allows and membership needs evolve

All member firms are expected to contribute to deliberations at meetings. Only firms that respond to the Client Relationship Management Sentiment Survey will receive the report from the survey.

[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

Client Relationship Management

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

Strategic Account Management

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

Client/Advisor Experience

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

MEMBERSHIP DUES

Membership dues for 2021 are \$4800. Dues invoiced upon acceptance, on or before January 1, 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

For

Name

Name

Position

Position

Date

Date

Signature

Signature