



2021 Membership Agreement

Participant 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 \$56,000 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 using the Hivebrite app
- Input into Roundtable activities at a planning (and naming) committee
- 4 one-hour online meetings (2 attendees)
- 1 in-person meeting in October 2021 (1 registration per company)
- 2 participant polls (\$7,000 sample budget)
- 2 5-question company practices polls and accompanying position paper
- List of contacts at participating firms
- Recognition of your firm's participation in Social Media posts
- 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

Participant Experience Roundtable – Representative #1

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

Responsibilities (check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Client-level participant strategy | <input type="checkbox"/> Digital Experience |
| <input type="checkbox"/> Marketing/Communication | <input type="checkbox"/> Education |
| <input type="checkbox"/> Counseling/Advice | <input type="checkbox"/> Dedicated (on-site) representatives |

Participant Experience Roundtable – Representative #2

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

Responsibilities (check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Client-level participant strategy | <input type="checkbox"/> Digital Experience |
| <input type="checkbox"/> Marketing/Communication | <input type="checkbox"/> Education |
| <input type="checkbox"/> Counseling/Advice | <input type="checkbox"/> Dedicated (on-site) representatives |

Participant Experience Roundtable – Representative #3

First Name	M.I.	Last Name	Designations
Title			
Email address		Office Phone	Mobile Phone
Responsibilities (check all that apply)			
<input type="checkbox"/> Client-level participant strategy		<input type="checkbox"/> Digital Experience	
<input type="checkbox"/> Marketing/Communication		<input type="checkbox"/> Education	
<input type="checkbox"/> Counseling/Advice		<input type="checkbox"/> Dedicated (on-site) representatives	

MEMBERSHIP DUES

Membership dues for 2021 are \$2800. 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