AMC Institute 2010-2011 Active Membership Dues Renewal

Don't allow the benefits of your membership to be interrupted! Act now to renew your AMC Institute membership and pay your annual dues. Steps to get started are listed below, based on your membership type. We look forward to a rewarding year with you as an AMC Institute Member!

You will be asked to provide your company's Demographic Information, read and agree to the AMC Institute Membership Criteria and Code of Ethics & Professional Practices, and make your dues renewal payment.

All 2010-11 AMC Institute annual membership dues must be received by August 1, 2010. Receipt of 2010-11 Membership Dues will put your company in good standing with AMC Institute until July 31, 2011. NOTE: Access to the Members' Only area of the AMC Institute website will be inactivated for non-renewed members after August 1, 2010. Consequently, all member companies that have not renewed by August 31, 2010 will be officially resigned from AMC Institute, losing all member benefits. Be sure to take advantage of all that AMC Institute has to offer - renew now!

Once you complete the information requested below, please PDF or send all pages and payment to:

AMC Institute Headquarters
100 North 20th Street, 4th Floor
Philadelphia PA 19103
USA
OR
Fax: +1 215-963-9785
OR
info@amcinstiute.org

You will receive payment confirmation via email however it is recommended that you keep a copy of this completed form for your records.

STEP 1 - Demographic Information

As part of this year's membership renewal, updated demographic information is required. AMC Institute's ability to accurately assess and report the state of the AMC industry hinges on updated demographics. The collection of aggregate statistics will fuel public relations and marketing efforts moving forward, including our ability to report trends and new statistics that warrant media attention for the industry, for AMC Institute and potentially for your AMC. In addition to promoting the depth and reach of member AMCs to our target market audiences, the data is also useful in attracting new associate members and supporters.

1. **Number of FTE's:** Any employee receiving a paycheck inclusive of appropriate state, federal and other deductions and who works 30 hours per week or more for an AMC will be considered a "full time equivalent" or FTE. ___________
2. **Number of Associations Managed Full-Time:** ___________
3. **Grand Total of Client Members:** Enter the total number of all your clients' members.
   a. **Individual:** ___________
   b. **Trade:** ___________
4. **Grand Total of Client Budgets:** Enter the total amount of all your clients' most recently completed year-end (audited or unaudited) gross annual revenue. ___________
5. **Number of Project Management Clients:** (Outsourcing projects) ___________
6. **Client Scope:** Select the scope of your client base. Your selection will determine how your company appears in our online membership directory. (Check all that apply).
   - ☐ Local
   - ☐ State
   - ☐ Regional
   - ☐ National
   - ☐ International
7. **Client Types:** Select the types of clients you serve. Your selection will determine how your company appears in our online membership directory. (Check all that apply).

   ☐ Professional ☐ Philanthropic

   ☐ Trade

8. Services Offered: Select the services you offer your clients. Your selection will determine how your company appears in our online membership directory. (Check all that apply).

- ☐ Administration
- ☐ Board Meetings
- ☐ Certification
- ☐ Consulting
- ☐ Financial Management
- ☐ Full Management
- ☐ Government Relations
- ☐ Market Research
- ☐ Marketing
- ☐ Meetings/Conventions
- ☐ Membership Development
- ☐ Program/Project Management
- ☐ Public Relations
- ☐ Publications
- ☐ Standards Development
- ☐ Strategic Planning
- ☐ Trade Shows/Exhibits
- ☐ Web Services

STEP 2 - *Membership Criteria* and *AMC Institute Code of Ethics & Professional Practices*

Please read the *AMC Institute Membership Criteria* and *AMC Institute Code of Ethics & Professional Practices* below. You will be required to provide your signature of approval.

AMC INSTITUTE MEMBERSHIP CRITERIA

1. My company is an AMC providing a full range of association management services to two or more organizations.
2. My company recognizes the unique mission, goals, structures and needs of each of our association clients and uses our best efforts to meet these needs.
3. My company operates ethically and in compliance with all applicable laws and regulations.
4. My company accurately represents its expertise, experience, credentials and services to the public.
5. My company manages all client accounts and funds in accordance with generally accepted accounting principles (GAAP) unless a client specifically directs in writing that we account for funds on a Cash Basis.
6. My company complies with the non-profit federal tax requirements to ensure that our clients maintain their tax-exempt status.
7. My company abides by the policy that prohibit co-mingling of any and all client assets with those of the AMC and any other client assets.
8. My company has adopted policies to ensure disclosure to clients of all income received from commissions, finder's fees and other sources directly attributable or related to each client.
9. My company has written agreements with each client whenever feasible stating, at a minimum, the services to be provided, fees and billing procedures and the term and termination aspects of the contract.
10. My company maintains a confidentiality policy with each client either as part of the contract or in a separate written document.
11. My company has an evaluation procedure for all employees covering competencies, performance assessment and professional development.
12. My company has in place a comprehensive insurance program that provides minimum coverage where such coverage is available in the state or country where my company is headquartered. This includes:
    - Commercial General Liability
    - Property
    - Valuable Papers
    - Employee Dishonesty
    - Money and Securities
    - Computer equipment and data
    - Non-owned and hired auto liability
    - Worker's Compensation
    - Errors and Omissions
13. My company maintains complete and accurate records (property, paper, electronic, contracts and materials) for each client.
14. My company agrees to avoid any and all potential client conflicts of interest.
15. My company communicates regularly with each client to ensure we are providing all contracted services in an effective and efficient manner.
16. My company ensures the integrity and confidentiality of each client's relationship with its legal counsel and the protection of all privileged materials and information.
17. I have read, understand and agree to abide by the principles as stated in the AMC Institute Code of Ethics and Professional Practices.

AMC INSTITUTE CODE OF ETHICS & PROFESSIONAL PRACTICES

Association management firms holding membership in the AMC Institute (formerly International Association of Association Management Companies pledge, as part of their membership obligation, to observe formal ethical and professional standards as permitted by laws.

Purposes

The Code of Ethics and Professional Practice signifies voluntary assumption by members of the obligation of self-discipline above and beyond requirements of law. The code signifies AMC Institute members' commitment to maintain a high level of ethics, public service and professional conduct and to declare that, in return for the faith placed in them, they accept an obligation to conduct their business in a manner that will be beneficial to clients, potential clients, colleagues, members of allied professions and the public.

The code, which has evolved out of the experience of members since AMC Institute was incorporated in 1964, gives clients a basis for confidence that members will serve them in accordance with exemplary standards of competence, objectivity and integrity.

The Professional Obligation

The reliance of association leaders on the leadership and counsel of association management companies imposes on the industry an obligation to maintain high standards of integrity and competence. To this end, members of AMC Institute accept the responsibility:

- to place the interests of clients and prospective clients ahead of their own;
- to maintain independence of thought and action;
- to hold affairs of the clients in strict confidence;
- to strive to improve the professional skills of their staffs;
- to observe and advance professional standards of association management;
- to uphold the honor and dignity of the industry; and
- to accept from staff members no less than the highest standards of professional conduct.

In recognition of the public interest and their obligation to the industry, AMC Institute members and the professionals on their staffs have agreed to comply with the following articles.

Basic Responsibilities to Clients

We will place the interests of clients ahead of our own and serve them with integrity, competence and independence. We will assume an independent position with each client, making certain that advice to clients is based on impartial consideration of pertinent facts and responsible opinions.

We will guard as confidential all information concerning the affairs of clients that we gather during the course of professional engagements. We will not take personal, financial or other advantage of material or information coming to our attention as a result of our relationship with clients; nor will we provide the basis on which others might take such advantage.

We will not serve two or more competing clients, or clients in any known adversarial relationship, without their knowledge and consent. Under certain circumstances we recognize that an adversarial relationship may be such that service to a client is inappropriate and we would have to discontinue our relationship.

We will inform clients of any relationships, circumstances or interests that might influence our judgment of the objectivity of our services.
As members of AMC Institute, we will share with our colleagues' innovations that contribute to the enhancement of association management company operations. We will not knowingly, without a client's permission, share data, procedures, materials or techniques that are the property of the client.

Client Arrangements

We will accept only those engagements we are qualified to undertake and which we believe will provide tangible benefits to clients. We will assign personnel qualified by knowledge, experience and character to provide effective service. As principal of the firm will be responsible for the firm's performance.

We will, before accepting an engagement, confer with the prospective client in sufficient detail and gather sufficient facts to gain an adequate understanding of the client's needs. The preliminary exploration will be conducted confidentially, on terms and conditions agreed upon by the member and the prospective client.

We will make certain that the client received a written proposal that outlines the objectives, scope and estimated fees or fee basis for proposed service. After a relationship with a client has been established, we will discuss with the client any significant changes in the nature, scope, timing, fees or any modifications to the relationship before acting on them.

We will serve each client on an individual basis, maintaining each association's independence.

We will not serve a client under terms or conditions that might impair our objectivity, independence or integrity. We will reserve the right to withdraw from a relationship if conditions beyond our control develop to interfere with the successful conduct of the engagement.

Client Fees and Charges

We will clearly set forth the nature and scope of all fees, charges, expenses and other costs to be charged to a client prior to accepting an engagement.

We will maintain client funds separately from our own and from those of other clients.

We will not incur fees, charges, expenses, other costs or financial commitments beyond the policies and budgets of our clients without their prior approval.

We will not accept commissions or rebates of any type on products or services purchased for our clients without informing them of our policy in advance.

The Industry Obligation

In order to promote the highest quality of performance in the operation of association management companies, AMC Institute member firms pledge to assume leadership responsibility for the enhancement of the independent investor-owned association management company industry.

Basic Responsibilities to Our Industry

We will strive to advance and protect the standards of the association management company industry. We will strive to improve our knowledge, skills and techniques, and will make available to our clients the benefits of our professional attainments.

We recognize our responsibilities to our clients, to the public interest and to our industry to contribute to the development and understanding of better ways to manage associations. By reasons of education, experience and broad contact with a variety of associations, management companies are especially qualified to recognize opportunities for improving the management of these groups and recognize an obligation to share knowledge with colleagues in the industry.

We will regularly evaluate the quality of the work done by our staff to assure consistent professional quality.

If we are approached by employees of a client's members or of other management firms regarding employment in our firm, or in that of a client, we will handle each incidence in a way which will be legally correct as well as equitable to all parties.

We will not solicit employees of a client's members for employment by us or by others, except with the consent of the client.

We will administer the internal and external affairs of our firm in the best interest of our industry.

We will advertise our services in a truthful and non-misleading manner.

We will strive to broaden public understanding of the association management industry's role. By doing so, association management companies will inspire confidence and garner support, further establishing their important function in today's society.

We will conduct ourselves so as to reflect credit on the industry and to inspire the respect and trust of clients and the public. In the course of our practice we will strive to maintain a professional attitude toward those we serve, toward those who assist us in our practice, toward our peers and toward members of allied organizations.

"I attest that my AMC is in compliance with the AMC Institute Membership Criteria and I have read, understand, and agree to abide by the principles as stated in the AMC Institute Code of Ethics and Professional Practices."

X____

Signature

STEP 3 - Dues Type

Please select the appropriate dues category below based on your total AMC income.

Active US Member

- ○ Sales - < 199,999
- ○ Sales - $200,000 to $499,999
- ○ Sales - $500,000 to $999,999
- ○ Sales - $1,000,000 to $1,999,999
- ○ Sales - $2,000,000 to $3,999,999
- ○ Sales - $4,000,000 to $5,999,999
- ○ Sales - $6,000,000 to $9,999,999
- ○ Sales - $10,000,000 to $19,999,999
- ○ Sales - > $20,000,000
- ○ Provisional

Active International Member

- ○ Sales - < 199,999
- ○ Sales - $200,000 to $499,999
- ○ Sales - $500,000 to $999,999
- ○ Sales - $1,000,000 to $1,999,999
- ○ Sales - $2,000,000 to $3,999,999
- ○ Sales - $4,000,000 to $5,999,999
- ○ Sales - $6,000,000 to $9,999,999
- ○ Sales - $10,000,000 to $19,999,999
- ○ Sales - > $20,000,000
- ○ Provisional International

2010-2011 Dues Schedule		
TOTAL AMC Annual Income	**UNITED STATES DUES**	**NON US DUES** (Payable in US Dollars)
Provisional Status	$690	$555
Less than $200,000	$830	$465
$200,000 - $499,999	$1575	$1,000
$500,000 - $999,999	$2,655	$1,000
$1,000,000 - $1,999,999	$3,500	$1,155
$2,000,000 - $3,999,999	$5,040	$1,155
$4,000,000 - $5,999,999	$6,720	$1,735
$6,000,000 - $9,999,999	$9,240	$1,735
$10,000,000 - $19,999,999	$12,600	$1,735
$20,000,000 and above	$17,325	$1,735

Total:

Payment Information

Name: ____

Company: ____

Address: ____

City: ______________________ State: __________ Zip: ____________

Phone: __________________ Email: ________________________

Payment Information ☐ Check ☐ Visa ☐ MCard ☐ AmEx

Card Number______________________ Exp Date______________

Name on Card: ____________________________________

You will receive payment confirmation via email however it is recommended that you keep a copy of this completed form for your records.