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AMC MEMBERSHIP APPLICATION

Date: _____

I am applying for (please select one):

- Active Membership Status:** AMCs must manage more than one association and provide a full range of services.
- Provisional Membership Status:** AMCs managing one association. Granted for a 12-month period.

SECTION A: COMPANY LOCATIONS

The information provided in this section will determine how your company listing appears in the AMC Institute online directory.

Company Name: _____

Company Website: _____

Company General Email: _____

PRIMARY LOCATION

Address: _____

City: _____ ST: _____ Zip Code: _____

Province: _____ Country: _____

Phone: _____ Fax: _____

COMPANY ALTERNATE LOCATION(S) *If you need more room, please attach separately*

Address: _____

City: _____ ST: _____ Zip Code: _____

Province: _____ Country: _____

Phone: _____ Fax: _____

SECTION B: COMPANY CONTACTS

The information provided in this section will determine how your company listing appears in the AMC Institute online directory.

OWNER (All communications from AMC Institute will be sent to the owner unless otherwise specified. If you wish to indicate another staff member to receive all communications, please indicate below as the Key Contact.)

Name: _____ Title: _____

Company Location: *(If listed above, just indicate city and state)* _____

Phone: _____ Email: _____

KEY CONTACT (If other than Owner)

Name: _____ Title: _____

Company Location: *(If listed above, just indicate city and state)* _____

Phone: _____ Email: _____

MEETING PLANNER

Name: _____ Title: _____

Company Location: *(If listed above, just indicate city and state)* _____

Phone: _____ Email: _____

CHIEF FINANCIAL OFFICER

Name: _____ Title: _____

Company Location: *(If listed above, just indicate city and state)* _____

Phone: _____ Email: _____

IT PERSONNEL

Name: _____ Title: _____

Company Location: *(If listed above, just indicate city and state)* _____

Phone: _____ Email: _____

SECTION C: COMPANY INFORMATION

The information provided in this section will determine how your company listing appears in the AMC Institute online directory.

Year Company Founded: _____

of FTEs*: _____

* # of FTEs =(Any employee receiving a paycheck inclusive of appropriate state, federal and other deductions and who work 30 hours per week or more for an AMC will be considered a "full time equivalent" or FTE)

Status:

Corporation Sole Ownership/Proprietorship Partnership Limited Liability Company

- Services Offered:**
- | | |
|---|---|
| <input type="checkbox"/> Administration | <input type="checkbox"/> Meetings/Conventions |
| <input type="checkbox"/> Board Meetings | <input type="checkbox"/> Membership Development |
| <input type="checkbox"/> Certification | <input type="checkbox"/> Publications |
| <input type="checkbox"/> Consulting | <input type="checkbox"/> Public Relations |
| <input type="checkbox"/> Financial Mgmt | <input type="checkbox"/> Program/Project Mgmt |
| <input type="checkbox"/> Gov't Relations | <input type="checkbox"/> Standards Development |
| <input type="checkbox"/> Marketing | <input type="checkbox"/> Strategic Planning |
| <input type="checkbox"/> Marketing Research | <input type="checkbox"/> Tradeshows/Exhibits |
| | <input type="checkbox"/> Web Services |

SECTION D: ORGANIZATIONS SERVED

The information provided below will determine how your company listing appears in the AMC Institute online directory.

Organizations Managed:

To how many organizations (associations, societies, foundations, etc) do you provide *full service* management? _____

Current client roster (please do not use acronyms; please duplicate this page if you need more space to list current clients.)

To how many organizations do you provide *outsourced services*? _____

Client Scope:

__ Local __ State __ Regional __ National __ International

The information provided below will be kept CONFIDENTIAL. It will only be used for demographic compilation and to develop aggregate totals to market the power of the AMC industry. Providing this information will also help assure that the associations listed below are excluded from receiving AMC marketing materials.

Full service organizations managed:

	<i># of organization</i>	<i># of members</i>
<i>Individual</i>		
<i>Trade</i>		
<i>Philanthropic</i>		

Grand total of their annual budgets: \$ _____

Markets Served: Please indicate what percentage of your AMC revenue comes from each of the following markets. Percentages should total 100%.

- | | |
|--|---------------------------------|
| __ Agriculture | __ Building & Construction |
| __ Education | __ Finance & Business |
| __ Food & Hospitality | __ Healthcare |
| __ Life Sciences | __ Manufacturing & Distribution |
| __ Retail | __ Technology |
| __ Professional Services (Legal, Accounting, etc.) | |
| __ Other _____ | |

SECTION E: DESCRIPTION

Please provide a 50 word description of your company which will be featured in our online directory.

SECTION F: DUES SCHEDULE

AMC Annual Income	US Dues	Non US Dues (USD)
Provisional	\$847	\$555
<\$250k	\$847	\$465
\$250k - \$500k	\$1,524	\$1,000
\$500k - \$1m	\$2,591	\$1,000
\$1m - \$2m	\$4,145	\$1,155
\$2m - \$4m	\$6,217	\$1,155
\$4m - \$8m	\$8,704	\$1,735
\$8m - \$16m	\$11,316	\$1,735
\$16m - \$32m	\$13,579	\$1,735
>\$32m	\$14,937	\$1,735

Companies that join AMC Institute after September 1st will submit a full year's dues up joining. Upon renewing your membership for the August 1st renewal date, you will receive a prorated invoice.

Payment Information

Check Visa MCard AmEx

Card Number _____

Expiration Date _____

Signature authorizes charge to card

\$ _____

TOTAL PAYABLE TO AMC Institute
(In US dollars)

Remit to the AMC Institute Office

Membership dues are not deductible as charitable contributions for federal income tax purposes. Dues may be deducted as a business expense to the extent allowed by law.

Please note that only your company name and the dues dollar amount you are paying will be shared with the AMC Institute Board of Directors in the application approval process.

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.

Name of AMC Owner _____
(Please Print)

Signature _____ Date _____

SECTION G: HOW DID YOU HEAR ABOUT US?

How did you hear about AMC Institute?

Internet Search: _____
(Google, Yahoo, Etc)

AMC Institute Website

ASAE Website

Colleague Referral: If applicable name of member who recommended membership:

Other: _____

What's the most valuable benefit you would like to get from your AMC Institute Membership?

I would like to learn more about the following programs. Please send me information.

- AMC Institute Accreditation**
- Getting Involved with AMC Institute**
- Money Saving Programs**
- Current Benchmarking Studies**
- Upcoming Educational Events**

APPENDIX B: 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.