

FAQs

Membership and Annual Conference

It is with great pride that we work with our partners to accomplish our mission to be the premier bank marketing organization in North America. Through networking, education, innovation and industry expertise, Heritage Clubs provides its members with the resources and opportunities to be the most knowledgeable and successful in their field.

We cannot accomplish our mission without the support of our partners. We greatly value the expertise and service that you provide our Heritage Clubs bank club directors (aka travel planners). We can confidently say that our bank club directors value our loyal partners and when you, our industry partners, invest the time to build trusted relationships with them, your group travel business will see results.

Of course, the best way to build these relationships is by attending the annual Group Travel Conference (aka Peer Group). In addition to this opportunity, your Heritage Clubs membership has many other benefits to help you succeed in working with this group travel market.

Here is some helpful information to provide our partners with a firm understanding of Heritage Clubs' history and unique membership. We wish you great success as you invest to grow your group travel business within our community bank club market.

Heritage Clubs International (HCI) is a very unique organization in addition to our conference being one of kind within the industry. What makes Heritage Clubs so different? First of all, our bankers are not in competition with each other, which creates a very intimate and friendly atmosphere at the conference. Our attendees, bankers and partners alike, come back year after year, somewhat reminiscent of a family reunion. Our bankers, although friendly and quite casual at the conference, are there to do business, and your success within our organization will depend on your ability to build relationships with our bankers. You will find that they respond very positively to our loyal partners.

FAQs:

1. **Conference Registration:** Lodging is NOT included in your registration. Partners have the option to reserve their room through HCI at a discounted conference rate and may select as many nights as they need to stay. Additional nights for late departure or early arrival can be arranged at this special rate. Meals and materials ARE included.
2. **What is Peer Group?** Peer Group is a term we use to describe our annual conference.
3. **Who are the buyers?** Your 'buyers' in our organization represent Community Banks from across the country. They are the Bank Club Directors (Loyalty and Travel Clubs) from their banks. Some wear multiple hats in addition to being the director and others are solely the club director. They are the Group Travel planners and buyers.
4. **How do I make my hotel reservation?** Indicate the days that you will be attending on your registration form, and Heritage Clubs will make hotel reservations for all attendees. If you need early or late departure, Heritage Clubs can make those arrangements for you at the special conference rate.

5. **Is there transportation to and from the airport to the host hotel?** Yes, the Host City provides complimentary shuttle service for all attendees on the main arrival/departure days which are Monday and Friday of the conference. Details will be provided closer to the conference date.
6. **What is a PTO?** Preferred Tour Operator. Heritage Clubs has 3 membership categories: Bank Club Directors representing community banks, Preferred Tour Operators and Industry Partners (Suppliers, DMOs, Attractions and Properties).
7. **On the conference schedule, what is a PTO showcase?** Our Preferred Tour Operators have 30 minute presentations throughout the conference. They have different membership privileges along with required conference commitments and sponsorships.
8. **When is the Business Appointment Marketplace (BAM), and is it optional?** The BAM is your time to shine! Each industry partner is encouraged to have a BAM booth. The cost for this is \$650. Second delegates from the same company share a booth but must also be a registered conference attendee. Exhibitors will receive details prior to the conference as to when they can set up for the BAM, where they can ship materials and how many participants they should plan for.
9. **Should I plan to handout our annual Group Tour Planners?** Each partner has the opportunity to include a one-page profile in the Conference Resource Directory received by every conference attendee. This year we ask that you hand these out during the Travel Expo. Remember that the bankers will be receiving a LOT of information (paper) and only so much will actually go home with them as it gets heavy. We recommend that you use your Group Tour Planners for a follow-up mailing with the contacts you make at the conference.
10. **Do Partners get to go on the Monday Sightseeing Tour?** Priority is given to our Bankers, however Partners who register for the 4-night option (Monday – Thursday) and pay by the early bird registration date will be allowed to participate if there is room available.
11. **When does my membership expire?** Membership covers the calendar year. Heritage Clubs offers an annual membership discount (August-October) for a \$100 savings but it is applied to the following calendar year. All conference attendees are required to be paid members.
12. **Do I have to stay for the entire conference?** At Heritage Clubs we believe that the foundation of your success is built upon the relationships that you build with the bank club directors. We believe that the best time and place to nurture and cultivate these relationships is while at the annual conference. We encourage partners to stay the entire time and take advantage of talking with bankers during meals, breaks, etc. to really get to know them and develop that relationship. Of course, if it is necessary to arrive late or leave early, that is permissible but there are not credits given for registration and transportation to and from the airport is your responsibility.
13. **Are there any other schedule ‘must knows’?**
 - a. Breakfast – There is typically a Keynote Speaker/Business session at each breakfast. It starts at 7:30 am (doors open at 7:15 am). This is not a ‘stop-in’ when you can to grab a bite to eat.
 - b. Educational Sessions – Heritage Clubs tries to provide valuable educational sessions for our partners as well. There are only a few ‘bankers only’ sessions. Unless there is a simultaneous Partner session, partners are welcome to sit in on the Banker educational sessions. Partners are encouraged to participate in the Joint educational sessions, as well.

- c. Attend All Meals: Bankers notice when partners are missing from meals. Again, we recommend attending all functions and meeting new people to cultivate relationships.
- d. Opening Ceremony – Tuesday afternoon. This session is for all conference attendees. We introduce the HCI management, HCI Advisory Board, and each Travel Partner delegate. We also review the conference schedule and share any important reminders.

14. **Who can be a conference sponsor?** All HCI Partners are encouraged and invited to be a sponsor. Each sponsorship delivers different benefits for the sponsor but all come with valuable recognition. Sponsorships range in price from \$500 - \$3,000 including but not limited to meals, speaker introductions, coffee breaks, hospitality suites and advertising. We encourage our Partners to get creative with sponsorships. Partner with others from your state or region. Theme your sponsorship to really represent you!

Contact Tina for details and availability
(952) 835-6543
tina@heritageclubs.com

What is a Heritage Club?

A Heritage Club is a targeted marketing solution for **community banks** interested in building new relationships, solidifying existing relationships, and building core deposits, the cornerstone on which banks are funded. The bank clubs offer many services to their customers including financial and social advantages such as special banking advantages and rates, financial seminars, and social affairs including group travel around the world.

Heritage Clubs International (HCI) bank members represent non-competitive banks. HCI offers association membership as a resource for our banks to network with their peers and industry members, including the group travel industry and other bank club marketing partners.

History

The Heritage Clubs program was founded in 1980 by First Citizens National Bank in Mason City, Iowa. When O. Jay Tomson and Colin B. Robinson launched their club, they never dreamed this program would be on the cutting edge of target marketing concepts.

In 1998, George Aker was appointed President of Heritage Clubs International, Inc. The headquarters was moved to Reno, NV in 2002.

In June of 2007, Mr. Aker sold Heritage Clubs to Ted Nelson, owner of Hospitality Tours, one of HCI's Preferred Tour Operators. Mr. Nelson then hired staff and opened up an office in the Minneapolis area. Today the staff runs the daily operations of HCI through Tina Goeske the Associate Director, and Mr. Nelson is the Executive Director.

HCI Management Structure

Minnesota Office

P.O. Box 1866, Maple Grove, MN 55311

Direct (952) 835 -6543

Tina Goeske, Associate Director

tina@heritageclubs.com

Ted Nelson, Executive Director (East Harwich, MA)

ted@heritageclubs.com

Heritage Clubs International also has an Advisory Board currently made up of 6 elected bank club directors, and 6 Travel Industry Representatives along with HCI management.