

Heritage Clubs International Bank Club Membership Policy

WHY JOIN

You will be joining the finest organization for bank clubs in North America. The exclusivity agreement ensures that you will only be sharing ideas, trips and networking with non-competing banks. The emphasis on educational opportunities to improve bank club membership, programming and ultimately relationships with its customers is of the highest concern to HCI. Consider these points:

- ✓ Heritage Clubs International (HCI) is the only organization in North America exclusively for bank club directors.
- ✓ It is an exclusive membership as each member bank is awarded a geographic region from each location it registers in which no competitive bank may join.
- ✓ As an organization of Community Banks no credit unions are invited to join.
- ✓ The educational opportunities are designed to make our bank club directors the very best in North America.
- ✓ HCI has the only Certification Program in North America for Bank Club Directors
- ✓ HCI does not control any bank growth or acquisition even if it should infringe into another bank's territory. With the highly changing bank world of acquisitions, mergers and expansions there will be times when multiple members' geographic territories may infringe on one another. At that time, we ask them to work well together, but neither bank will lose their membership in HCI.

MEMBERSHIP JOINING FEES & DUES

1. **HOW TO JOIN:** A bank may join Heritage Clubs International (HCI) in either of two ways:
 - a. **TRAINING:** HCI will conduct formal training on how to create a bank club at a training cost of \$3,500.00. No additional joiners fee or membership dues are due that first year.
 - b. **JOINERS FEE:** If a bank already has an existing bank club and does not require formal training they may join for the first year for a "joiners" fee of \$350.00.
2. **ANNUAL DUES:** Beginning the 2nd year the bank has become a member they have only the annual membership dues (currently \$100.00) to pay. Membership is on a calendar basis.
 - a. **WAIVING DUES:** All bank club members are considered members in good standing when they have completed their annual online renewal application and paid the annual membership dues (currently \$100.00). The annual \$100.00 dues can be waived if the bank club has had at least 15 paid travelers with any number of our Preferred Tour Operators (PTOs).
3. **MULTIPLE LOCATIONS:** Banks may enroll any of their locations or other charters as HCI members and those locations can join in one of two ways:
 - a. **ANNUAL DUES:** Each branch location pays the \$100 annual renewal fee.
 - b. **WAIVING DUES:** The first member location has 15 passengers travel with an HCI Preferred Tour Operator the prior year, and each additional location just needs five additional paying passengers with any PTO for each additional branch location.
4. **LAPSED MEMBERSHIPS:** Banks that do not renew their membership by completing the renewal application and paying the annual membership dues (currently \$100.00) or having the dues off-set by working with our corporate partners, will be considered "Lapsed" and will not have access to the member-only pages of the website and will not be able to attend HCI events until they renew or rejoin.

We welcome all community banks to join HCI to meet and network with your Peers across the country, learn how to improve your program, travel with the finest travel partners in the world, and to meet all of the expectations of your senior management as to relationship growth and profitability.

2018 HCI New Member Application

BANK NAME:	_____
City, State, Zip:	_____
YOUR NAME:	_____
Your Official Title:	_____
Street Address:	_____
Mailing Address:	_____
Primary Phone:	_____
Secondary Phone:	_____ Fax: _____
Email:	_____
Bank Website:	_____

***** PERMISSION REQUEST:** In an effort to best help our Industry Partners, we request your permission to share your club and travel information with our membership. Your signature at the bottom of this form is an authorization for us to share the information you provide. ***

1. CLUB NAME: _____
2. Are you the primary club director? Yes No*
* If no, please list the primary club director's name & location: _____
3. Are you reporting for your club alone or multiple clubs? one club multiple clubs
If applicable, list any other additional club contacts and titles: _____

4. How many branches does your club represent? _____
5. What year was your club formed? _____
6. What year did you become the club director? _____
7. How many members do you have today? _____

On average, please share your club's annual activity in the following travel categories:

- ◆ Day trips Average # _____ trips and # _____ travelers
- ◆ Motorcoach trips of 4 days/3 nights or less Average # _____ trips and # _____ travelers
- ◆ Motorcoach trips longer than 4 days/3 nights Average # _____ trips and # _____ travelers
- ◆ Trips that require flying in North America Average # _____ trips and # _____ travelers
- ◆ International trips Average # _____ trips and # _____ travelers

Please share with us some of the **special interests** your club enjoys (check all that apply):

- Cruises
- Casinos/Gaming
- Historical and general sightseeing
- Spa / All-Inclusive
- Active (ie. biking, hiking, golfing & fishing)
- Sporting Events
- Culinary
- Theater
- Women-Only
- Other: _____

Do you offer trips specifically catered to Baby Boomers? Yes No

Over the next 3 years (2018, 2019, 2020) what major destinations do you hope to plan for club trips:

North America (United States, Mexico and Canada) - check all that apply:

- West Coast
- Southeastern US
- Alaska
- Canadian Rockies
- Other: _____
- Pacific Northwest
- New England
- Hawaii
- Maritime Canada
- Midwest
- Mid-Atlantic
- Mexico
- Eastern Canada (Ontario & Quebec)

International Destinations - check all that apply:

- Central America/Panama Canal
- Southeast Asia
- Western Europe
- Antarctica
- South America
- China
- Scandinavia
- Africa
- Japan
- Eastern Europe
- Middle East
- Australia/New Zealand & the South Pacific

Heritage Clubs appreciates your interest in becoming a Banker Member. Once your application and payment have been processed, we invite you log into the website www.HeritageClubs.com and check out the member-only resources that are available to you. If you have any questions, please contact Tina Goeske. We look forward to working with you and hope to meet you at Peer Group or one of our Fall Forum events.

Your Signature

Date

Completed application along with payment can be sent to: Heritage Clubs International, P.O. Box 1866, Maple Grove, MN 55311 or sent via email to Tina Goeske

Questions? Contact Tina Goeske, Associate Director | 877.881.0229 | tina@heritageclubs.com

2017 TRAVEL REPORT (Travel Completed January 1, 2017-December 31, 2017)

Please report all 2017 travel below including tours with Preferred Tour Operators (PTOs) and other operators. As a member of HCI you may offset the Annual Fee of \$100 (starting next year) by reporting your tours during the previous year with any one of the PTOs that includes a **minimum of 15 paid travelers**. *Qualifying PTOs are: ChinaPlus Tours, Collette Vacations, CTN Travels, Globus Family of Brands, Hospitality Tours, Islands in the Sun Cruises and Tours, Mayflower Tours, and Ozarks' Kirkwood Tour and Travel.*

Bank Name with City, State: _____

Completed by: _____ Date: _____

Extended Trips (National or International Tours – usually more than 5 days) :

Tour Company	Dates of Travel	# of Pax	Destination
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Regional Tours (usually 2 to 5 days) :

Tour Company	Dates of Travel	# of Pax	Destination
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Day Trips – Total Number: _____

Destinations/ Events (list Top 10 or continue on separate page):

_____, _____, _____
 _____, _____, _____
 _____, _____, _____

Heritage Clubs takes great pride in offering our Bank Club members **special services, products and partnerships** that benefit you, your club and your bank. We would like to know **who you have had the opportunity to work with over the past few years**. These partnerships include **Corporate Partners** along with the many **destinations (CVBs), attractions, vendors and suppliers** who support us.

Please list here any HCI industry partners that you have worked with (other than Preferred Tour Operators):

_____, _____, _____
 _____, _____, _____
 _____, _____, _____

2017 VISITED LOCALES REPORT

(Travel Completed January 1, 2017 -

December 31, 2017)

Please check off all of the HCI partners that have been included in all of your 2017 travel plans. Our DMO/CVB partners want to know when you have traveled in their locales.

Organization	City	State	Tour Visit	Meal Stop	Overnight Stay (#)
Greater Birmingham Convention & Visitors Bureau	Birmingham	AL			
Bentonville Convention & Visitors Bureau	Bentonville	AR			
Eureka Springs City Advertising & Promotion	Eureka Springs	AR			
Red Hot Celebrations LLC	Lakewood	CA			
Safe Passage International	Lakewood	CO			
Visit Jacksonville	Jacksonville	FL			
Albia Chamber of Commerce	Albia	IA			
Council Bluffs Convention & Visitors Bureau	Council Bluffs	IA			
Greater Des Moines Convention & Visitors Bureau	Des Moines	IA			
Diamond Jo Casino	Dubuque	IA			
Dubuque Convention & Visitors Bureau	Dubuque	IA			
Kalona Historical Village	Kalona	IA			
Diamond Jo Casino	Mason City	IA			
Honey Creek Resort	Moravia	IA			
Iowa Group Travel Association (IGTA)	Urbandale	IA			
Paramount Theatre	Aurora	IL			
Visit Lake County, IL	Gurnee	IL			
Celebration River Cruises, Inc.	Moline	IL			
Hardy's Reindeer Ranch	Rantoul	IL			
Heritage Corridor CVB	Romeoville	IL			
Riverboat Twilight	Scales Mound	IL			
Chicago's North Shore CVB	Skokie	IL			
Amish Country of Northern Indiana / Elkhart County CVB	Elkhart	IN			
Kansas City Kansas Convention & Visitors Bureau	Kansas City	KS			
Go Wichita Convention & Visitors Bureau	Wichita	KS			
Lafayette Convention & Visitors Commission	Lafayette	LA			
Lafayette Hotels	Bangor	ME			
Witham Family Hotels	Bar Harbor	ME			
Grand Hotel	Mackinac Island	MI			
Visit Duluth	Duluth	MN			
Eagan Convention & Visitors Bureau	Eagan	MN			
Roseville Visitors Association	Roseville	MN			
St. Cloud Area Convention & Visitors Bureau	St. Cloud	MN			
Daytrippers Dinner Theatre	St. Louis Park	MN			
Branson/Lakes Area CVB	Branson	MO			
Grand Plaza Hotel	Branson	MO			
Radisson Hotel	Branson	MO			
Dutton Family Theater/Inn Complex	Branson	MO			
Sight & Sound Theatres	Branson	MO			
Silver Dollar City / Showboat Branson Belle	Branson	MO			
Jefferson City	Jefferson City	MO			

Organization	City	State	Tour Visit	Meal Stop	Overnight Stay (#)
Pulaski County Tourism Bureau	Saint Robert	MO			
Greater St. Charles Convention & Visitors Bureau	St. Charles	MO			
North Dakota Tourism	Bismarck	ND			
Greater Fargo-Moorhead Convention & Visitors Bureau	Fargo	ND			
Strategic Air & Space Museum	Ashland	NE			
Grand Island/Hall County Convention & Visitors Bureau	Grand Island	NE			
Sarpy County Tourism	Gretna	NE			
Kimball County Tourism	Kimball	NE			
Lincoln Chamber of Commerce	Lincoln	NE			
North Platte/Lincoln County Convention and Visitors Bureau	North Platte	NE			
Southern Nevada Regional Office (Laughlin)	Las Vegas	NV			
Las Vegas CVA	Laughlin	NV			
Cherokee Nation Cultural Tourism	Catoosa	OK			
National Cowboy & Western Heritage Museum	Oklahoma City	OK			
Courtyard by Marriott Gettysburg	Gettysburg	PA			
Sight and Sound Theaters	Strasburg	PA			
Crazy Horse Memorial	Crazy Horse	SD			
Deadwood Gulch Gaming Resort	Deadwood	SD			
South Dakota Department of Tourism	Pierre	SD			
Black Hills, Badlands and Lakes Association	Rapid City	SD			
Rapid City Convention & Visitors Bureau	Rapid City	SD			
Sioux Falls Convention & Visitors Bureau	Sioux Falls	SD			
Chattanooga Area Convention & Visitors Bureau	Chattanooga	TN			
Graceland Attractions	Memphis	TN			
Memphis CVB	Memphis	TN			
Grand Ole Opry	Nashville	TN			
Tennessee Department of Tourist Development	Nashville	TN			
Richmond Region Tourism	Richmond	VA			
Essex Culinary Resort & Spa	Essex Junction	VT			
Vermont Tourism Network	Montpelier	VT			
Silver Reef Hotel Casino Spa	Ferndale	WA			
Fox Cities CVB	Appleton	WI			
The Fireside Dinner Theatre	Fort Atkinson	WI			
Janesville CVB	Janesville	WI			
La Crosse Queen Cruises	La Crosse	WI			
Circle Wisconsin	Milwaukee	WI			
Real Racine	Sturtevant	WI			
Charleston Marriott Town Center	Charleston	WV			
Charleston WV Convention & Visitors Bureau	Charleston	WV			

HCI's Canadian Partners

Tourism Prince Edward Island	Charlottetown	PE			
Quebec City Tourism	Quebec City	PQ			
Tourism New Brunswick	Campbellton	NB			
Province of Nova Scotia	Halifax	NS			