



HERITAGE CLUBS INTERNATIONAL STORY

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 bank loans 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, LLC (HCI) bank members represent non-competing 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.

What is its ownership 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, and in 2019 the office moved to Waupaca, Wisconsin. Today the staff runs the daily operations of HCI through Tina Goeske the Associate Director and Mr. Nelson is the Executive Director.

Is there a Board of Directors? No. HCI has an Advisory Board currently made up of 6 elected bank club directors, and 6 Travel Industry Representatives along with HCI management

HCI Management Structure

Wisconsin Office P.O. Box 363, Waupaca, WI 54981 Direct (952) 835 -6543

Tina Goeske, Associate Director tina@heritageclubs.com

Ted Nelson, Executive Director (Cape Cod, MA) ted@heritageclubs.com

Contact Tina for more information (952) 835-6543 Tina@heritageclubs.com
