

## What is a Heritage Club?

**Customer Loyalty \* Deposit Growth \*  
Cross - Selling Success \* Relationship Building**

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. A Heritage Club program offers qualifying bank customers special benefits, special attention & a reason to keep their money from the competition.

### Who benefits from a Heritage Club?

Everyone involved benefits from your commitment to customers' financial, social and physical well-being. Effective Heritage Club leaders offer their customers varied investment options while welcoming them to experience fun, travel and social opportunities. Your bank will benefit too! For providing club members with products and services designed exclusively for them, the bank can expect to be rewarded with **customer loyalty** and a positive "buzz" that will spread throughout your community.



*Heritage Clubs International, the foremost bank marketing organization in North America, provides education, networking, and innovative travel resources for its members to become the most knowledgeable and successful professionals in their field.*

Heritage Clubs International:  
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Executive Director

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[www.HeritageClubs.com](http://www.HeritageClubs.com)



"The foremost bank marketing organization in North America."

**Your Exclusive  
INVITATION TO JOIN...**

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## Membership Benefits

- **Annual Peer Group Conference**  
4-day educational conference in new location each year with a FAM tour
  - > Peer to Peer networking “Open Mic Sessions”
  - > Educational seminars
  - > Preferred Tour Operator Destination Showcases
  - > Business Appointment Marketplace (BAM)
- **www.HeritageClubs.com**  
Heritage Clubs is proud of the tools and resources available to our members to aid in their success:
  - > Open Mic Sessions
  - > Membership contact list
  - > Resources Library: Images, articles & best practices
- **Preferred Tour Operators**  
ChinaPlus Tours  
Collette  
CTN Travels  
Globus Family of Brands  
Hospitality Tours  
Islands in the Sun Cruises & Tours  
Mayflower Cruises & Tours  
Ozarks’ Kirkwood Tour & Travel
- **Certified Bank Club Director program**  
The first Professional Certification program for Bank Club Directors in North America. HCI Directors earn recognition for the unique education received throughout the year earning the distinction of CBCD.
- **Travel Protection Insurance Plan**
- **Corporate Partnerships**  
Industry partners offering preferred pricing to Heritage Clubs members.

## Heritage Clubs Membership

### How to become a Heritage Clubs member bank?

Heritage Clubs International (HCI) membership currently includes 150+ unique member banks representing 225 staffed club offices in 32 states. The current membership policy is to allow one bank per community providing members with a proud network of non-competitive banks willing to share best practices and ideas with each other.

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### Easy as 1 - 2 - 3 ...

1. Apply for membership with Heritage Clubs. For application, contact: Tina Goeske at (877) 881 - 0229 or tina@heritageclubs.com
2. Membership acceptance is based on applicants demographic location to current HCI member banks. IF an applicant is in the same community as a current member, HCI will seek approval from the current member.
3. Upon approval, HCI will notify applicant of their acceptance and complete the application process for payment and training, if applicable.

### Current fee structure:

- New Club needing complete training:  
\$3,500 one-time joiners fee & includes full training
- New HCI Member with existing club:  
\$350 one-time joiners fee
- All members: \$100 annual fee (waived if 15 pax travel with our Preferred Tour Operators)

## MEMBER Testimonial:

### Kitty Nash

Home State Bank, N.A. (Crystal Lake, IL)  
Senior Class Club Director - 15 years

*“There is no way to quantify the impact Peer Group has on the success of our Club. Each year the education, the unique travel opportunities, and the valuable connections to DMOs<sup>1</sup>, PTOs<sup>2</sup>, and other Peer Group members revives, renews, and recharges us for another year. Add to that the exchange of information that happens all year long, and as they say, ‘it’s priceless’.*

*Our clubs run on ideas and energy. The product we offer is a successful travel club that increases our bank’s bottom line and helps our customers live a dream. Many of our best ideas have come from the shared showcase and DMOs who create an atmosphere of fun that we pass on to our Club members.*

*A bank travel club director will never be able to fully explain the job or the goal. It’s great to work with DMOs, PTOs, and other Clubs who ‘get it’ without explanation.*

*HCI is not just a link to networking, reliable travel and continuing education, it’s a link to specific people and products that provide exactly what we need to succeed. What could be better than that?”*

<sup>1</sup> DMO - Destination Marketing Organization

<sup>2</sup> PTO - Preferred Tour Operator

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