



MEMBERSHIP INFORMATION

The Heritage Institute is a community within which professionals can prepare for and experience their most desired professional and personal outcomes.

We are recognized as the world's foremost authority on creating successful multi-generational families. And, we have an unmatched wealth of intellectual property, processes, training, expertise, and resources for building deeper client relationships, creating relationships with your existing clients' families, and helping your client families stay together for multiple generations. All of which helps your clients in ways no other advisor is helping them, while increasing both your profit and your personal satisfaction. And, in the end, many of our members find that our most valuable asset is the community itself. By itself, the ability to interact with and benefit from the wisdom and experience of like-minded professionals from across the nation (and the UK and Canada) generates a huge return on your investment.

We have three levels of membership. Below is a brief description of each level:

THI Member: Every THI Member of The Heritage Institute receives access to Knowledge Vault, which is our private community network, online library and training platform. Knowledge Vault provides you with access to our community, which is founded upon and supported by original thinking, original products, concepts, strategies and processes. And overarching all of that is the fact that we are a TRUE community, where the sharing of experiences and expertise is done generously, openly and for the benefit of one and all. Our community includes all of our Members and Strategic Relationships, giving us a very wide bandwidth.

Knowledge Vault also includes an ever-growing library of White Papers and other resources, along with a calendar of events including conference calls, webinars, Academies, Study Groups and Coaching Groups. The specific documents you can access are determined by your Membership Level.



THI Partner: The desired outcome of this membership level is to collaborate with Heritage Professionals to develop the proven Heritage Design techniques that will allow you to identify core values and "what matters most" to each client. Master the dialogue needed to successfully introduce Heritage Design to your staff, clients, and prospects and then build deeper relationships with the second generation and beyond by implementing multi-generational Heritage Design with your clients.

THI Partner is for those who would like to introduce multi-generational Heritage Design to their clients, but do not desire to do it on their own. They receive all of the Member benefits, plus the collaboration with one or more assigned Heritage Designed Professionals™ to provide Heritage Design expertise to the THI Partner's clients and community. THI Partners also receive a limited Intellectual Property license that allows them to co-brand certain materials for the benefit of their clients and their marketing.

Certified Members: The desired outcome is to become fully trained, equipped and certified to provide multi-generational Heritage Design and The Heritage Process™ to individuals and families, and to partner and collaborate with other professionals to provide multi-generational Heritage Design and The Heritage Process to their clients. Certified Membership begins with our Heritage Design Professionals™ Coaching Program, and includes those members who qualify as Heritage Design Professionals™ (previously known as Certified Wealth Consultants, or CWCs). ***This is the only level of membership that includes training, coaching and mentoring in the Initial/Ongoing Heritage Days and family governance, which is the difference between the successful 10% who keep their families and assets together for multiple generations and the 90% who fail to do so.***

Certified Members receive all of the Member benefits plus annual coaching programs and a license to use all of the materials in THI's unmatched intellectual property library. This membership level is for any advisor who desires to build deeper relationships with and increased retention of their existing clients, build relationships with and engaged their clients' family members as new clients, and receive more quality introductions from both clients and allied professionals. When asked about their desired outcomes for their family in the future, most clients will say they want to see their family together, harmonious, and productive. Through Heritage Design services, you can help your clients and their families achieve those outcomes.



THI MEMBER BENEFITS

As a Member of The Heritage Institute, you can:

- Acquire new, higher level skills
- Learn how to build deeper, more significant relationships
- Receive and share experiences and expertise with the best people in your profession
- Instantly identify and contact members of the community who can assist you in any client/donor/organization issue you have
- Experience the opportunity to contribute to the community experience (and through the community to the world) with your time, talents, passions, and experiences
- Receive a tuition discount to attend Heritage Institute Advanced Training Academies, and the purchase tuition bundles at a larger discount
- Receive a discount to attend The Heritage Institute's Annual Meeting and Dinner
- Have 24/7 access to a one-of-a-kind library of materials, tools and resources that will enhance everything you do. Although Members do not have access to certain Heritage Design materials that are available to only our Certified Members, you will find the materials that are available to you to be very valuable and helpful.
- Purchase *Beating the Midas Curse* and *What Matters* books at a discount
- Purchase customized Special Editions for both *Beating the Midas Curse* and *What Matters* with your branding
- Receive real-time news and updates on the experiences and changes in this new and ever changing industry



THI PARTNER MEMBERSHIP

This membership level is for those who would like to introduce multi-generational Heritage Design to their clients, but do not desire to do it all on their own. Consequently, THI Partners are assigned one or more Heritage Design Professionals™ as who will collaborate with them to provide Heritage Design services.

As a THI Partner you can “co-brand” selected THI materials in a collaborating relationship with one or more Heritage Design Professionals™ to provide Heritage Design services and fulfill whatever role you are qualified for as part of that process. THI Partners also have access to a Marketing Suite and other materials for that role. This level allows you to offer Heritage Design as an additional service offering without becoming a HDP™ yourself.

In addition to the Member benefits described above, THI Partners receive:

- Listing on National Website (www.theheritageinstitute.com) (if one of your qualified HDP™ partners is listed)
- Coordinated action plan with your qualified HDP™ partner(s)
- Ability to co-brand certain Heritage Institute materials with your qualified HDP™ partner(s)
- Access to a Marketing Suite and other materials that are applicable to the specific role(s) you will fill in the collaboration
- Individualized coaching/mentoring from your HDP™ partner



CERTIFIED MEMBERS

HERITAGE DESIGN PROFESSIONALS™ AND CANDIDATES (FORMERLY KNOWN AS CERTIFIED WEALTH CONSULTANTS™)

During the first year (as a Heritage Design Professional™ Candidate) you receive:

- The Heritage Design Professional™ Coaching Program
- Twelve 90-minute coaching/mentoring calls
- Listing on our National Website (www.theheritageinstitute.com)
- Best Business practice assessment
- 120-day Action Plan Checklist
- Discounted tuition to attend THI's Advanced Training Academies
- Attendance at our Annual Meeting (just the Annual Meeting and Dinner portion)
- Access to Advanced Study Groups
- Access to the Certified Candidate Member Team on the Knowledge Vault, which includes the full Resource Library
- A license to use all of The Heritage Institute's intellectual property¹
- Access to customize many of The Heritage Institute's publications
- Additional discounts for the following:
 - *Beating the Midas Curse* and *What Matters* books
 - Customized and Special Editions of both *Beating the Midas Curse* and *What Matters*
 - A Marketing Suite of materials that can be customized for you. *Contact us for currently available options*
 - Your spouse and/or support staff may attend any of the above academies for a discounted price per day or event.
 - Family Portfolios

¹ Heritage Design Professional™ Candidates receive access to some of these materials as they complete their coaching program. They do not receive total access until they have completed their certification requirements.



- The right to receive the following Membership Credits: You will receive the following credits against your next year's membership fees:
 - \$750.00, each, for the first three HDP™ Candidates that you introduce to THI in your membership year, and
 - \$1,500.00, each, for each additional HDP™ Candidate you introduce to THI in your membership year.

YEAR 2: The second year of the coaching program provides the experience necessary to begin mastering the concepts and skills the HDP™ learned in year one. This year is also when the HDP™ clearly identifies the role(s) they desire to perform and create the collaborative team of professionals that will fill all other roles. During the second year (as a Heritage Design Professional™) you receive:

- Heritage Design Professional™ Certificate
- Full license to use all of The Heritage Institute's intellectual property
- The right to participate in an advanced Coaching Group, tuition free (three in-person meetings per year)
- Four coaching/mentoring calls
- The right to use the Heritage Design Professional™ (or HDP™) designation as long as you satisfy the ongoing requirements and maintain your membership in good standing
- Listing on our National Website (www.theheritageinstitute.com)
- Ability to be a qualified HDP™ Partner for a THI Partner member
- Discounted tuition to attend any of THI's Advanced Training Academies
- Attendance at our Annual Meeting (just the Annual Meeting and Dinner portion)



- Additional discounts for the following:
 - *Beating the Midas Curse* and *What Matters* books
 - Customized and Special Editions of both *Beating the Midas Curse* and *What Matters*
 - A Marketing Suite of materials that can be customized for you. Contact us for currently available options
 - Your spouse and/or support staff may attend any of the above academies for a discounted price per day or event.
 - Family Portfolios
- The right to receive the following Membership Credits: You will receive the following credits against your next year's membership fees:
 - \$750.00, each, for the first three HDP™ Candidates that you introduce to THI in your membership year, and
 - \$1,500.00, each, for each additional HDP™ Candidate you introduce to THI in your membership year.

YEAR 3 AND BEYOND: The third year and beyond is where the HDP™ begins to reach mastery plateaus, and continues to refine the roles they desire to perform and the collaborative team of professionals with whom they work. Your Certified Member fee for the third year and beyond includes:

- A full intellectual property license to use our intellectual property
- The right to participate in an advanced Coaching Group, tuition free (two in-person meetings per year)
- Attendance at our Annual Meeting (just the Annual Meeting and Dinner portion)
- The right to use the Heritage Design Professional™ or CWC designation if you are a Certified Member in Good Standing (and you are only in good standing if you have completed the ongoing continuing education and other requirements)
- The right to attend any of our Advanced Training Academies at discounted tuition, and
- Full access to Knowledge Vault.



- Additional discounts for the following:
 - *Beating the Midas Curse* and *What Matters* books
 - Customized and Special Editions of both *Beating the Midas Curse* and *What Matters*
 - A Marketing Suite of materials that can be customized for you. Contact us for currently available options
 - Your spouse and/or support staff may attend any of the above academies for a discounted price per day or event.
 - Family Portfolios
- The right to receive the following Membership Credits: You will receive the following credits against your next year's membership fees:
 - \$750.00, each, for the first three HDP™ Candidates that you introduce to THI in your membership year, and
 - \$1,500.00, each, for each additional HDP™ Candidate you introduce to THI in your membership year.
- In addition, you will be able to choose from a menu of other “Year 3 and Beyond” benefits on an ala carte basis, such as:
 - Listing on The Heritage Institute's website (www.theheritageinstitute.com)
 - Participation in the Heritage Professionals Group (if you meet its qualifications)
 - Participation in an Advanced Marketing Group