



Affinity Group Leader Annual Sign-Off

Affinity Group Leaders (AGLs) participate in ProVisors and promote the ProVisors mission of being a community of professionals who serve their clients as trusted advisors, while sharing the highest standards of integrity, performance, and accountability. AGLs have a unique opportunity to build relationships with and among Members and exchange information and business opportunities among one another, thereby promoting and enabling collaboration for the benefit of the AGLs, Members, and their clients. It is important that AGLs uphold similar standards, policies, and procedures.

As an Affinity Group Leader, I agree to the following:

- Code of Ethics & Responsibilities of Membership: I will be familiar with and utilize the ProVisors' [Code of Conduct](#) and [Member Handbook](#), including the Arbitration and Dispute Resolution procedure.
- [Affinity Group Leader Guide](#): I have read the Affinity Group Leader Guide.

Goals: I am committed to cultivating a healthy group, that meets the expectations of Members, which include the following:

- Maintaining an average of at least 30 Members in attendance at every meeting.
- Convening meetings monthly, 12 times per year.
- Creating and delivering relevant content to engage Members and drive commerce.

Affinity Group Leader Associates (AGLAs): I will mentor the AGLA to take on additional ProVisors' leadership responsibilities and have him/her run at least one meeting each year. Should a vacancy arise, I will nominate at least one AGLA candidate to the Regional Director.

Executive Committee (EC): I will convene an EC composed of experienced Members of the group, including an AGLA. To assist in the growth and success of our group, I will conduct EC meetings, at least quarterly, to receive support in: driving attendance, driving commerce and other sharing among Members; ideating topics of interest for group meetings; promoting a spirit of community within the group; and providing other assistance to me as necessary.

Budget: I will familiarize myself with the budget guidelines set forth in the Affinity Group Leader Guide and ensure the group manages its finances in compliance with those processes and policies.

Group Meetings: I will hold 12 monthly group meetings, including joint meetings. Standard agenda items at each month's meeting will include testimonials, organizing Troikas and introducing Guests.

Participation I will promote ProVisors to the business and professional communities at large. This benefits the Members of the group and grows and maintains the AGLs business relationships by broadening the AGLs business network. In addition to presiding over the group's monthly meetings and abiding by ProVisors' Code of Conduct and Member Handbook, I will endeavor to:

- Participate in at least 80% of all regional Affinity Group Leader meetings each year.



- Hold an Executive Committee meeting at least once a quarter and will notify the RD of time, day and location of each meeting.
- Attend ProVisors-wide social events/mixers held in my region.
- Attend at least six group meetings, other than the one I lead, each year.
- Regularly encourage Members of the group to actively promote their Affinity Group and recruit qualified Members to participate.
- When attending another group’s meeting as a Member or Guest, I will support the presiding Group Leader’s efforts to run an effective meeting
- I will stay subscribed to ProVisors email communications to ensure I receive the most up-to-date information. If I have unsubscribed, I give you permission to resubscribe me to Member communications.

Responsibilities to ProVisors: I will be responsive to requests from the Regional Director and the ProVisors office in a timely manner and will proactively provide feedback, suggestions, and observations. I seek to volunteer my time and become/remain a GL because I believe it is in my best interest to be a leader among the Members who are all my peers in our community. If I decide to step down as a Group Leader, I will provide 90 days’ notice to the Regional Director to ensure a smooth transition.

Group Leader Name	Group Leader Signature	Date
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Regional Director Name	Regional Director Signature	Date
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