



## Home Group Leader Annual Sign-Off

Group Leaders (GLs) 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. GLs 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 GLs, Members, and their clients. It is important that GLs uphold similar standards, policies, and procedures.

### As a 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.
- [Group Leader Guide](#): I have read the GL Guide.

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

- Group Membership target: 35+ Members.
- Diversity of the Members in the group: a well-rounded group including people from different professions, genders, ethnicities, religions, etc.
- Target Member retention rate: 80% or greater, year-over-year.

**Recruiting:** I will recruit Members who possess the characteristics described in the [GL Toolkit](#). I will encourage Members of the group to actively recruit qualified Members and will make myself available to screen prospective Members. I regularly will educate Members on the characteristics of a qualified Member and the recruiting and screening process.

**Renewing Members:** I will be notified by ProVisors of upcoming Membership expirations 90 days prior to their lapse date. At least 60 days in advance of a Member's renewal, I will alert the RD of any Members who, to my knowledge, are not in good standing or have failed to abide by ProVisors' Code of Conduct and Member Handbook to ensure they are not invoiced and automatically renewed. I will also take appropriate and timely action regarding non-performing Members.

**Group Leader Associates (GLAs):** I will mentor the GLA 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 GLA candidate to the Regional Director.



**Executive Committee (EC):** I will convene an Executive Committee composed of experienced Members of the group, including a GLA. To assist in the growth and success of the group, I will conduct EC meetings quarterly to receive support in: recruiting Members to ensure the group's composition reflects the Group Matrix outlined in the Group Leader Manual; operating a mentor program for newer Members; reviewing and following up with under-performing Members; driving commerce and other sharing among Members; deriving topics of interest for group meetings; promoting a spirit of community within the group; as well as, provide other assistance to me as necessary.

**Social Budget:** I will familiarize myself with the social budget guidelines set forth in the 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 each year, including joint meetings. Standard agenda items at each month's meeting will include testimonials, organizing Troikas and introducing Guests. I will review ProVisors' Code of Conduct and membership policies on a regular basis. In my absence, I will appoint a GLA or another Executive Committee Member to run the meeting.

**Closed Meeting:** The group will have at least one closed meeting each year. Topics of discussion may include: recruiting new Members by provider type; prospective meeting agendas for the upcoming year; Member commitment to increasing commerce within the group; and, ways to improve the benefits of Membership in ProVisors.

**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 GLs business relationships by broadening the GLs 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 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.
- Take advantage of a complimentary Membership in a second ProVisors group (should I choose) through active participation (note: complimentary Memberships provided to GLs of Home groups only).
- Attend ProVisors-wide social events/mixers held in the region.
- Attend at least six group meetings, other than the group I lead, each year.
- 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

---

Regional Director Name

---

Regional Director Signature

---

Date