



The Canadian Association of Family Enterprise Southwestern Ontario Chapter

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CANADIAN ASSOCIATION OF FAMILY ENTERPRISE SOUTHWESTERN ONTARIO CHAPTER

ASSOCIATE MEMBER APPLICATION

(Membership Dues: \$925.00 per year + 6% GST (\$55.50) = \$980.50)
GST # 86524 9502 RT0001

COMPANY:	
Mailing Address:	
City:	
Province:	
Postal Code:	
Phone Number:	
Fax Number:	
Email:	
Website:	
REPRESENTATIVE INFORMATION:	
Principal Representative:	
Title:	
Telephone:	
Email:	
2 nd Representative:	
Title:	
Telephone:	
Email:	
BUSINESS DESCRIPTION INFORMATION:	
Type of Business:	
Founding Date:	
Number of Employees:	
Annual Sales:	
Family Business%:	
Yellow Pages Listing:	

Please state how your organization is sympathetic to and agrees with the goals and objectives of CAFE?

What is your organization's professional interest in issues concerning family business?

Associate members are expected to participate in the educational components of the Chapter. How is your organization prepared to facilitate idea exchange, educate and advance the knowledge of family business affairs for the benefit of CAFE members?

How will your organization assist in encouraging new family businesses to join CAFE?

How were you referred to CAFE?

Date:

Submitted by:

Company
Name:

Name of Principal
Applicant:

The annual fee of \$980.50 is payable upon joining CAFE.

We understand the goals of CAFE and agree to the Obligations of Membership provided. I will also ensure my colleagues are made aware of the Associate Membership Criteria outlined.

Date: _____ **Signed:** _____

Date: _____ **Signed:** _____

FORWARD TO:

Canadian Association of Family Enterprise
Southwestern Ontario Chapter
PO Box 23034, London, Ontario N6A 5N9
Tel: (519) 642-4349 / Fax: (519) 642-2873

Obligations of membership:

1. The purpose of CAFE is to promote the health and growth of family business in Canada. More specifically, this means that members are dedicated to the perpetuation of the family business through exchange of experiences, ideas and education. Any action by a member which mitigates against this fundamental objective of CAFE will be dealt by the Board of Directors and may include the Board removing a member who clearly has been violating the spirit and intent of this code of ethics.
2. Private and group exchanges of any sort between members, participants and resource persons in any CAFE event are confidential. These exchanges are not only confidential to CAFE members: unless otherwise exempted, they will be considered confidential to all those involved. Under no circumstances will any member convey information to the press which might be construed as being offensive to other members or to CAFE.
3. Membership in CAFE is not for the purpose of solicitation of business by a member.
4. Misuse of the CAFE membership directory of listings of participants in any CAFE event will be considered a serious violation of CAFE policy.

Policy Regarding Associate Membership:

1. Associate members are limited to a set maximum percentage of the total Chapter membership, as decided by the Chapter.
2. Associate members are limited to two firms per market segment, at the discretion of the Chapter Board. When all available segments are filled, others may be created or existing segments added as the Board sees fit.

Present segments include:

Accounting	Law
Banking	Financial & Insurance Service
Broker Investment	Business Management & Planning

3. Associate members must assist in recruiting for membership. At least five (5) family businesses must be introduced to CAFE in the first year of membership of any Associate firm. In succeeding years, additional introductions must be made, with quotas established at the discretion of the Board of Directors.
4. Associate member representatives may stand for election to the Board of Directors (one per firm with no alternate permitted) and may serve as Chairs of various committees. However, Associate members may not be elected to the position of Chair or Vice Chair of a Chapter Board.
5. At its discretion, the Board may recommend limiting the total number of Associate members serving on the Board at any given time.
6. Associate membership is granted to a firm or company with one person to be designated as the key representative and a second designated as an alternate. If more than two representatives wish to participate routinely in CAFE affairs, the firm may be required to submit additional membership application form and fees, which the Board is under no obligation to accept.
7. Associate members will not be invited to participate in Personal Advisory Groups (PAG) due to a potential or perceived conflict of interest. However, Associate members are asked to inform family business clients of their organization, about the opportunity to join PAGs and extend an invitation to them to participate. Associate members are invited to participate in CAFE Consultant Advisory Groups (CAG) for individuals who provide advice and services to family business companies.
8. Associate members must be prepared to offer assistance to CAFE and to participate in and/or sponsor forums, social events and special technical sessions on a regular basis, as determined by the Chapter Board.
9. Associate members will not actively solicit business from CAFE members. Associate members are asked to display CAFE information/promotion materials in their reception areas and to inform partners and colleagues of the benefits of CAFE to family business clients.