



Fiscal Year Beginning August 1st, 2014

The Intellectual Capital Exchange Group (ICE) is a group of professionals from different disciplines who gather to systematically connect with each other to develop and deepen their relationships, expand and interconnect their networks, and explore opportunities to help others. Our goal is to pass ideal referrals to each other. We encourage this exchange through morning meetings, social events, and interactions with other organizations. Membership requires an active participation in the group to foster more interaction among members, better understanding of each other's needs, and exposure to a wider group of professionals. We attract and retain potential members who "get it", who are tenured within their professions, who have established businesses and deep relationships, and who are "pre-wired" to fully engage in the networking process.

Member Expectations

As a member of ICE, I will be expected to

- be an established professional in my discipline. Members should not be working to establish a new business.
- have a diverse range of contacts.
- share referrals under the appropriate circumstances.
- attend all meetings.
- participate in two 1-on-1 meetings with each other member of the group each year.
- make every attempt to introduce my fellow members to potential opportunities where appropriate and in an appropriate manner.
- treat the group as one of my most important clients.

Member Benefits & Responsibilities

ICE provides an opportunity for me to

- present a 15-minute case study of what I've done for a client
 - How I was referred to the client
 - The client's issue that required my assistance
 - The potential solutions for the issue
 - The chosen or recommended solutions.
 - How the client was better off because they hired me.
- attend regularly scheduled group meetings to
 - Systematically connect with other members to develop and deepen our relationships
 - Present a 30- to 45-second overview to help other members refer potential new business.
- interact with other members between meetings for 1-on-1 exchanges.
- display my profile (photo and biography) on capitalexchangegroup.org.
- represent my area of expertise exclusively.

\$100 annual dues for incumbent members are payable no later than July 1st. Renewal invitations are subject to a review of each member's participation. As a condition of ICE membership for the upcoming fiscal year, I agree to the stated expectations and benefits.

Applicant Name

Applicant Company

Member Signature Date

Please submit this completed renewal application with a check for \$100 payable to David Volkman to: David Volkman, Wealth Partners Advisors, LLC., 14 East 60th Street, Suite 402, New York, NY 10022.