



Affinity Program Application

For use by vendors wishing to promote products/services at a discounted rate to members of the Wisconsin Institute of CPAs

Vendor Information Please print or type.

Contact Person (s) _____ Title _____

Vendor/Company _____

Address _____ City _____ State _____

Web site _____

Phone _____ Fax _____ E-mail _____

Product/Service Information Please feel free to submit brochures or samples.

Formal name of product/service _____

Nature of product/service _____

What is the benefit to WICPA member _____

Target Audience (s)

- All members
- Members in management, business & industry
- Members in public accounting
- Public accounting firms or industry Companies
- Student members
- Other _____

Will the WICPA receive non-dues revenue, for example, based on member participation?

- No
- Yes

If yes, please explain _____

Is your product available to others?

- No
- Yes

If yes, who? _____

If yes, how? _____

What is the regular price? _____ Member price/discount percentage _____

Product/Service Information Continued

Is your product available at this special price elsewhere?

No Yes

If yes, who? _____

Anticipated market penetration: Year one _____ Year two _____

Anticipated WICPA revenue: Year one _____ Year two _____

Please explain how members would order/use your service. Include usage of special ID, phone number, online ordering information, etc. Please note: At no time should WICPA be responsible for ordering or payment processing.

Marketing Strategy

- Your product will be highlighted in WICPA publications and online at www.wicpa.org and will feature the WICPA Service Provider Seal.
- Please submit samples of marketing materials and budget plan for review. Telephone, e-mail and fax solicitations are not permitted.

Do you intend to market through direct mail?

No Yes

Mailing frequency: Annual Semi-Annual Quarterly

Target mailing date: _____ Number of pieces in mailing? _____

All marketing materials must be approved by the WICPA before distribution.

WICPA affinity vendors are required to spend a minimum of \$3,000/year on paid advertising and sponsorships with the WICPA. Our advertising and promotional menu is listed below, please indicate which you are interested in:

On Balance, a bi-monthly magazine offering four-color display advertising

\$282-\$2,106
depending on color and frequency

CPE Catalog, an annual professional development catalog featuring WICPA seminars and conferences

\$510-\$1,625

The Bridge, a bi-monthly newsletter featuring seminars, confer-

ences, breakfast meetings and discussion groups

\$150-\$950
based on size and frequency

CPA2B, a tri-annual newsletter distributed to college students

\$300-\$1,000 per issue
for sponsorship/ advertising

CPE E-announcement, a bi-weekly e-newsletter

\$210-\$400
based on frequency

www.wicpa.org: Choose from the home page or niche pages, i.e. CPE or young professionals

\$200-\$300 per month
depending on location

Exhibitor/conference sponsorship packages

\$250-\$625 per event

New Member Orientation

\$200

For more information, please review the WICPA media kit.

Marketing Strategy Continued

Are you currently in litigation?

No Yes

If yes, please explain _____

Are you currently under investigation by the Government?

No Yes

If yes, please explain _____

Any conflict of interest on this partnership:

Please list anyone you are related to at the WICPA or know personally.

References

Please list any State CPA societies your product/program is offered to below:

Contact name	State	Phone	Client since
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Please list at least three additional references below.

Contact name	State	Phone	Client since
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Feel free to describe below or submit any additional information about your company's history, reputation, quality of service, etc.

WICPA Affinity Policies & Procedures

Application. All vendors must submit an application to the WICPA in order to be considered as an affinity program provider.

Approval/Notification. The membership department will review all applications and forward its recommendation to the CEO for approval. You will be notified in writing regarding the decision.

WICPA Affinity Agreement. Vendors must sign the WICPA Affinity Agreement to initiate the program. The agreement will outline the WICPA and vendor responsibilities, royalty provisions, renewal and termination procedures, governing laws, indemnification and liability.

Marketing Plan. All products and services will be marketed under a vendor-developed detailed marketing plan to be approved by the WICPA. All offers must be mailed in separate, self-contained mailings. Vendors who offer their products or services on a regular basis must obtain approval for each mailing regardless of whether or not changes have been made in the direct mail piece since the previous mailing. All mailings lists are confidential and are not to be shared or sold for other purposes.

Advertising. WICPA affinity vendors are required to spend a minimum of \$3,000/year on paid advertising and/or sponsorships with the WICPA as outlined above. Details will be outlined in the WICPA Affinity Agreement.

Vendor Statement

I have read the above WICPA Affinity Policies & Procedures section and have completed this application in compliance with the policy. Our organization is responsible for all costs related to the marketing of our product including postage, labor, envelopes and paid advertising or sponsorships. Furthermore, our organization is responsible for all order and payment processing as well as distribution. Our program requires a minimal time commitment from WICPA staff. I understand the decision of the CEO is final.

Signature _____ Date _____

Printed name _____ Title _____

Submission Information

Return to:

WICPA Membership Department

235 N. Executive Dr., Suite 200

Brookfield, WI 53005

Phone: 262-785-0445 ext. 3026

Fax: 262-785-0838

e-mail: leah@wicpa.org

The approval process requires at least 45 days. For more information about the WICPA, visit www.wicpa.org.