

PortfolioExec.com is a trading style of PortfolioExec Ltd™
Web: www.portfolioexec.com Email: info@portfolioexec.com



Affordable, Available Business Expertise

MEMBERSHIP CHARTER (Associate and CRM Members)

©2010

The purpose of PortfolioExec™ is to help Associate Members who are starting, developing or already managing a 'portfolio career' gain advice, support and contacts both online and through regular network events.

Members are entirely free to interact and provide contacts and potential opportunities to other Members.

If a Member provides another with a contact opportunity which results in the second Member securing an engagement or appointment (say, as a non-Exec), PortfolioExec™ will not seek any consideration from that appointment.

Neither under any circumstances must a Member seek any monetary consideration from another Member on the promise of securing them an opportunity – this is not only illegal but will also result in immediate termination of Membership without refund of subscription.

PortfolioExec™ through its contacts and especially Corporate Members will promote the network and individuals within it and should we receive any corporate enquiry or enquiries which result in an appointment for any Member(s) it should be known that we will charge a modest engagement fee to the business from whom the appointment comes (*not* the Member securing the appointment).

If a Member introduces to PortfolioExec™ a recruitment opportunity where the business, either through the Membership network or from outside, and this results in a fee directly for PortfolioExec™, the introducing Member shall be entitled to a share in that fee. This will be agreed in advance of the engagement undertaking.

Members will respect others confidential information at all times and not, without permission, divulge this to 3rd parties.

Profiles contained in the PortfolioExec™ website are accessible to accredited Members and the administrator only and PortfolioExec™ is bound under the Data Protection Act. However, a Members' Profiles page is set up in the public area of the site and Members, at their discretion, may choose to have their Profile listed here too.

PortfolioExec Ltd,

PO Box 169 Clitheroe Lancashire BB7 0DH

Registered Office: Rational House, 64 Bridge Street, Manchester M3 3BN Company Registration No 6767295

PortfolioExec.com is a trading style of PortfolioExec Ltd™
Web: www.portfolioexec.com Email: info@portfolioexec.com

Inappropriate behaviour or use of privileged information to sell products or services will not be acceptable.

However, in certain cases the *News* section on the website could be used for such purposes and this can be discussed and agreed with the Directors.

Members should for their own benefit keep the Directors informed of any changes of circumstance such as email address or telephone numbers.

It would also benefit all Members to advise the Directors of any projects, appointments or other work they may secure and by mutual agreement to post these as *News* items on the website. The Member concerned should seek appropriate permission for this from his or her appointed business.

Membership is individual and non-transferable. Members only will be entitled to attend events, access password protected areas of the website or promote themselves through *News* items and profiles.

As www.portfolioexec.com is in the public domain certain areas are accessible to all although all Members details will remain confidential at all times and will never be divulged by PortfolioExec Ltd™ without express permission. Members should also respect this confidentiality in relation to other Members.

If an Associate Member is a Director or Partner in a company their personal Membership remains individual and in no way implies Corporate Membership (a separate facility) or endorsement of that particular firm by PortfolioExec Ltd™ nor does it imply endorsement by that particular firm, except in the case of direct sponsorship, of PortfolioExec Ltd™

Neither should an individual Corporate Representative Member (CRM) *unduly nor excessively* promote his/her firms' product or service (except through sponsored events) to other Members unless, following introduction, other Members expressly request such information.

Members will be encouraged to introduce others to the network as the larger the network the more valuable and effective it becomes to all.

Important Note: It will be the responsibility of each Member to ensure they have appropriate insurance cover for themselves or their businesses (such as Professional Indemnity) in relation to the work they are doing or seek to do.

- **Classes of Membership include:-**
- ***Associate (individual) Membership***
- ***Corporate Representative Membership – CRM (senior Director or Partner with a small firm)***
- ***Full Corporate Membership (of larger firm)***

PortfolioExec Ltd,

PO Box 169 Clitheroe Lancashire BB7 0DH

Registered Office: Rational House, 64 Bridge Street, Manchester M3 3BN Company Registration No 6767295