

### **Member Program Benefits**

Membership in the CRM Forum provides you access to a wealth of peer-group and industry knowledge to better manage your CRM environment. You will share in thought leadership with fellow asset management and advisory firms while gaining insight into what works and what doesn't when it comes to managing your client relationships. Participating in a dialog with some of the most progressive suppliers in the space will give you an understanding of cutting edge tools and a clear view of the direction that the CRM environment is heading in. You will also have access to the CRM Forum members to better understand the evolution of client relationship management through the years and potentially, to keep you from reinventing the wheel.

### **Attendees, Metrics and Frequency**

The Forum attracts professionals from both business, operations and technology disciplines within the asset management and advisory industry. There are currently in excess of forty five asset management and advisory firms participating in the Forum. Typically two individuals from a member firm participate at each forum. Meetings are held semi-annually generally on the third Monday and Tuesday of April and September. Locations vary and often will be situated geographically near a member firm. During the course of the year each firm will have the opportunity to participate in industry wide data surveys, application inventory and resource reports along with web-x's, teleconferences and informational exchanges which are designed to discuss member specified topics.

### **Format**

The Forum consists of a day and a half of networking sessions and round-table discussions on topics proposed by the members. Additional insights from varied industry experts will be presented in an educational and informational format. Time is allocated to provide the opportunity for members and partners to network. Access to survey data and general application inventory and resources reports when utilized.

### **Membership Opportunity**

The Forum is open to business, operations and technology professionals who are involved with client relationship management (CRM). Generally, CRM users are from sales, marketing, service, technology and product areas of financial service firms. In addition to attending each CRM Forum company membership entitles participation in all surveys, application inventory and resource reports along with interactive web-x, teleconferences, and informational exchanges. The annual membership fee is \$5,500. Expenses associated with attending each CRM Forum will be invoiced at registration and vary according to location.