



Membership Guidelines

- 1) Weekly meetings are held at Shadeland in Walnut Creek, CA first and third Thursday's from 1:00 to 2:30. Once our group grows, we will move to a local restaurant.
- 2) Referral Pros dues are a one-time membership of \$120 (non-refundable) and \$60 per month for lunch and reserves. Monthly dues are required first meeting of every month.
- 3) All members should be committed to growing the group and bring new members into the weekly luncheon.
- 4) Meetings start promptly at 1:00 pm and end at 2:30 pm. We ask that you always try to be on time.
- 5) If you can not make the meeting or are sending a substitute, you must contact the President within 24 hours prior to meeting.
- 6) If you plan on bringing a guest to the meeting, please contact the President within 24 hours prior to meeting.
- 7) 3 absences in 3 months and the membership committee will be reviewing your membership. If member has 6 absences in 6 months (not including substitute) there is probable cause for removal from the group.
- 8) Member should intend and have a "Dance Card" with another member at least once a month.

Name: _____

Signature: _____

Date: _____



Date: _____

Name: Business Name: _____

Business and Mailing Address: _____

Telephone Number: _____

Email Address: _____

Description of Business & Services: _____

What makes you unique, professional, and referable? _____

Please provide at least two references, all of whom have been informed that they are your references (customer, colleague, employer, community leader) – include name, telephone number, and nature of relationship with references.

1: _____

2: _____

Application fee: \$120

I understand that I will provide the goods and services to the members and their referrals in my category, pay for every meeting even if I do not attend every meeting and attend every meeting possible with the intent of helping to build the group so that we can all provide each other qualified referrals. If requested, I am willing to provide a major credit card to be on file that may be charged to pay for unpaid meeting fees.

Signature: _____

Date: _____

<https://www.referralproswc.com>



Personal Bio Sheet for Introduction of Business Presentation

Name: _____

Business Services Provided: _____

Name of Business: _____

Location of Business: _____

Number of Years in Business: _____

Previous Occupations: _____

Lives in City/Town of: _____

Spouse and Children: _____

Pets: _____

I want to Travel to: _____

I have Traveled to: _____

Number of times plead guilty: _____

Nobody knows that I once: _____

Awards won: _____

Someday I want to: _____

Birthday (month / day): _____



Mission Statement and Name Tag

Please provide your mission statement below:

Example: (Gathering more than 24 years of experience in the Life, Health, and Disability, and Long Term Care Industry including an emphasis on Group Employee Benefits and Retirement Plans, my mission is to help my clients receive the absolute best out of their benefits at the best price with the best service possible)

Please provide your name tag designation below:

Example: (Jim Barry, Residential Realtor)
