



## Partnership Application

We would like to join as an ASEC coalition partner at the following level:

- Charter Partner \$50,000 annual
- Sustaining Partner \$25,000 annual
- Full Partner \$10,000 annual

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Type of Organization: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Form of payment:**

- Check enclosed
- Charge
  - American Express
  - Mastercard
  - Visa

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

- Please send invoice

**EBRI-ERF Tax ID 52-1190398**

Your contribution is tax deductible as either a business expense or a charitable contribution to the Employee Benefit Research Institute Education and Research Fund (EBRI-ERF), a 501(c)(3) nonprofit organization, of which ASEC is a program. Consult your tax specialist. No portion of the funds will be spent on lobbying.

**Please fax this form to: 202-775-6312 or e-mail to: [mcdonnell@ebri.org](mailto:mcdonnell@ebri.org)**

Please see below for a detailed description of each ASEC partnership level:

**Charter Partner - \$50,000/year**

- One seat on the ASEC Charter Partner Council (a primary and alternative representative - one vote per organization). This group assists with issues related to the internal workings and development of ASEC such as: who should participate on the ASEC Policy Board (advisory group to Charter Partner group); re-evaluation of the number of partner levels; what committees are needed; agenda for ASEC Policy Board and partners meetings; recruitment of new ASEC partners; etc.
- Up to two seats on the ASEC Policy Board – This advisory board brings together representatives from our Charter and Sustaining Partner levels and representatives from the largest government agencies. Primary functions of the Board will be: to brainstorm ideas on how ASEC public- and private-sector partners can better work together on various committees; to coordinate programs among ASEC partners; to discuss initiatives that make sense for the coalition; to cooperate on expansion of the paid and unpaid partnership; to discuss project ideas for foundations to fund; to discuss how to make partner meetings more effective; to suggest speakers and ideas for future partner meetings, etc. Board meetings may also include other selected “special guests” invited by Charter Partners and Policy Board members.
- Invitation to the Policy Board reception and dinner the night before an ASEC Partners’ meeting.
- Participation in all ASEC committee meetings and activities.
- Access to partner-password protected section of the ASEC website page ([www.asec.org](http://www.asec.org)) – includes full contact lists of all partners (paid, government, and mission).
- Automatic underwriter of the Retirement Confidence Survey.
- Regular e-mail updates from ASEC regarding activities, meetings, and events related to financial education.
- Unlimited representatives at all ASEC Partner meetings (twice a year).

**Sustaining Partner - \$25,000/year**

- One seat on the ASEC Policy Board – This advisory board brings together representatives from our Charter and Sustaining Partner levels and representatives from the largest government agencies. Primary functions of the Board will be: to brainstorm ideas on how ASEC public- and private-sector partners can better work together on various committees; to coordinate programs among ASEC partners; to discuss initiatives that make sense for the coalition; cooperate on expansion of the paid and unpaid partnership; discuss project ideas for foundations to fund; discuss how to make partner meetings more effective; suggest speakers and ideas for future partner meetings, etc. Board meetings may also include other selected “special guests” invited by Charter Partners and Policy Board members.
- Invitation to Policy Board reception and dinner the night before an ASEC Partners’ meeting.
- Participation in all ASEC committee meetings and activities.
- Access to partner-password protected section of the ASEC website page ([www.asec.org](http://www.asec.org)) – includes full contact lists of all partners (paid, government, and mission).
- Regular e-mail updates from ASEC regarding activities, meetings, and events related to financial education.
- Up to four representatives at all ASEC Partner meetings (twice a year).

**Full Partners - \$10,000/year**

- Participation in all ASEC committee meetings and activities.
- Access to partner-password protected section of the ASEC website page ([www.asec.org](http://www.asec.org)) – includes full contact lists of all partners (paid, government, and mission).
- Regular e-mail updates from ASEC regarding activities, meetings, and events related to financial education.
- Up to three representatives at all ASEC Partner meetings (twice a year).

For more information about becoming an ASEC coalition partner, contact:

Ken McDonnell, Director American Savings Education Council (ASEC)

Chairman, ASEC Policy Board

202-659-0670 or 202-775-6367

[mcdonnell@asec.org](mailto:mcdonnell@asec.org)

Or, visit [www.ebri.org](http://www.ebri.org) and [www.asec.org](http://www.asec.org)