



# Host Agreement

Version 9.1.16

This White Glove Workshops Host Agreement is agreed upon by \_\_\_\_\_ of \_\_\_\_\_

Host Name

\_\_\_\_\_ (the "Host") and White Glove Workshops ("WGW") on \_\_\_\_\_

Company

Date

## I. BACKGROUND

- A. The Host is of the opinion that WGW has the necessary qualifications, experience and abilities to provide services to the Host.
- B. WGW is agreeable to providing these services (see section II) to the Host on the terms and conditions set forth in this agreement.
- C. A "Household" could be defined as a married couple or partners, for example, or a single individual.
- D. WGW is not responsible, nor do we guarantee the outcome of each individual Host's workshop turnout, however, the Host will only be charged for the number of Households in attendance, including registrant guests and walk-ins and the cost of the venue expenses.

IN CONSIDERATION OF the matters described above and of the mutual benefits and obligations set forth in this Agreement, the receipt and sufficiency of which consideration is hereby acknowledged, the Host and WGW (individually the "Party" and collectively the "Parties" of this agreement) agree as follows:

## II. SERVICES PROVIDED

- A. The Host hereby agrees to engage WGW to provide the Host with services (the "Services") consisting of:
  - i. Booking the meeting space for the workshop.
    - a. The Host is aware that WGW is providing a booking service and is not responsible for any facility issues once the workshop is booked. However, every effort will be made by WGW to reduce or eliminate any facility issues.
  - ii. All advertising and marketing for the workshop.
  - iii. Take all registrations for the workshop.
  - iv. Complete all confirmation calls and send all confirmation emails to registrants of the workshop.
  - v. Provide a PowerPoint presentation on the topic selected and marketed for.
    - a. Should the Host wish to use a presentation other than the PowerPoint provided by WGW, the Host must obtain prior approval by WGW.
  - vi. Provide the Host with an Evaluation Form to gather contact information for those attendees who would like to meet with the Host following the workshop (see section IV.A).
  - vii. Provide the Host with attendees interested in learning about the topic selected.
  - viii. Provide the Host with a Sign-In Sheet with a Hold Harmless disclosure.
    - a. All attendees must sign the Sign-In Sheet.
  - ix. Provide the Host with a list of all registered attendees via our designated Electronic Check-In Application (see section III. C) at least 6 hours prior to the workshops local time, The host will be required to record all attendees, including walk-ins.
    - a. A unique code will be provided to the Host to access their attendee list via email.

### **III. REQUIREMENTS AND EXPECTATIONS OF HOSTS:**

- A. The Host is required to bring all necessary workshop materials to the workshop (please refer to the Workshop Preparation Checklist in your Welcome Kit).
- B. The Host is required to visit the workshop location at least one week prior to the workshop to make sure the facility will be conducive to the workshop presentation.
  - i. This includes checking the internet connection, chair set-up, entrance accessibility, projector set-up, etc.
  - ii. WGW is not responsible for any issues that arise from the facility.
- C. The Host is required to use our designated Electronic Check-In Application to check-in attendees at registration.
  - i. This App is free, easy to use, and can be acquired through the Apple App Store and Google Play Store.
  - ii. Attendees are required to be checked in “live” as they arrive within the Electronic Check-In App. It is the responsibility of the Host to ensure their device (cell phone, tablet, etc.) is compatible with the application.
  - iii. Failure to use this application may result in a monetary penalty.
    - a. Should there be a technical difficulty, outside of the Host’s control, the fee may not be assessed.
- D. The Host is required to utilize the Hold Harmless Sign-In Sheet provided by WGW.
  - i. The Sign-In Sheet is required to be returned to WGW by 11:00am local time.
- E. The Host is required to arrive at the workshop location at least one-hour prior to ensure the set-up of the workshop (room configuration, technology, etc.), and to stay after the workshop to return the facility to its original state.
- F. The Host is required to have a designated check-in person to sign-in attendees and take attendance at the workshop.
  - i. This individual is required to arrive one hour prior to the workshop, be set up to check-in attendees thirty minutes prior and stay thirty minutes into the workshop presentation to check-in attendees who arrive late.
  - ii. The name and contact information of the registration person must be provided to WGW at least 48 hours prior to the workshop to ensure that proper Check-In training can take place.
- G. The Host is required to obtain NSSA® Certification prior to hosting their first WGW (for Social Security workshops only).
  - i. WGW has arranged the certification process for WGW Hosts and a discounted tuition cost of \$300.00.
  - ii. The online Proctoring Fee of \$25.00-35.00 as well as the cost of biennial renewal is the responsibility of the Host.
  - iii. In the event that certification is not obtained by the Host prior to marketing deployment of their workshop, the workshop will be cancelled by WGW.
- H. The Host is prohibited from discussing any topics regarding investments, products or securities during the presentation. The Host must also avoid over-promoting their services. The workshop MUST remain purely educational.
  - i. Failure to comply with the WGW purely educational standard will result in a fine, and/or termination of the relationship with WGW.

### **IV. CONTACT INFORMATION OF ATTENDEES**

- A. It is the responsibility of the Host to handout blank Evaluation Forms to all attendees in order to obtain the contact information of any attendee that may be interested in future contact with the Host (see section II.A.vi).
- B. Our Privacy Policy does allow WGW to share contact information of attendees on an as needed basis.

**V. TERMS OF THE AGREEMENT**

- A. The term of this Agreement (the “Term”) will begin on the date of this Agreement and will remain in full force and effect in perpetuity.

**VI. PERFORMANCE**

- A. The Parties agree to do everything necessary to ensure that the terms of this Agreement take effect.
- B. The Host is responsible for adhering to the rules and regulations set out by each individual workshop venue.

**VII. ATTENDANCE VERIFICATION**

- A. The registration person (see section III.F) will be contacted by a WGW representative prior to the workshop as well as the day following the workshop to ensure proper training on the Electronic Check-In Application takes place and to verify that the Households checked in are correct.
- B. Those who did not attend (“no shows”) will receive an email and phone call the day following the workshop.
  - i. In the event that WGW becomes aware of unreported attendee, the credit card on file will be charged and could result in additional fees (see section IX.B.ii).

**VIII. CURRENCY**

- A. Except as otherwise provided in this Agreement, all monetary amounts referred to in this Agreement are in U.S. Dollars (USD).

**IX. COMPENSATION**

- A. For the service rendered by WGW as required by this Agreement, the Host will provide compensation to WGW based upon each Household that shows up at the workshop (including registrant guests and walk-ins) regardless of whether they stay for the entire presentation, or if appointments are made, plus the costs associated with the room rental, which may include AV charges and catering expense.
  - i. The cost for Social Security 567/Women & Social Security workshops is \$135.00 per Household that actually attends (effective 9/1/2016).
  - ii. The cost for Taxes in Retirement 567 workshops is \$275.00 per Household that actually attends (effective 9/1/2016).
    - a. A discounted price of \$250.00 per Household will be assessed, if ALL of the following conditions are met.
      - a. Electronic Check-In is completed live.
      - b. The Sign-In sheet is utilized and returned to WGW no later than 11:00am local time.
    - iii. The costs outlined in sections IX.A.i and IX.A.ii may be adjusted with thirty day written notice.
- B. The Host agrees to provide an accurate list of the Households in attendance via our designated Electronic Check-In App once check in is complete at the workshop via synching the application as directed.
  - i. The credit card provided to WGW by the Host will be charged the following day for the number of Households indicated via the reconciliation of the Electronic Check-In App and the Sign-In Sheet.
    - a. In the event that the credit card provided is declined, the Host may be subject to additional fees.
  - ii. Once the attendance verification process is complete (see section VII. A-B), any unreported attendees that confirm their attendance with WGW through our next day “no show” follow up process, could result in a fine of up to \$350.00 per Household unreported.
  - iii. A WGW representative at each venue may be taking a general head count thirty minutes into each workshop.
- C. Should a sign language interpreter be requested by an attendee, WGW is not responsible for the interpreter fees, the Host will be billed for that service.
- D. The Host agrees to prior verification and presentation of funds in the form of a valid credit card

**X. RETURN OF PROPERTY**

- A. Following the termination of a Host's relationship with WGW, the Host agrees to return any materials provided to the Host by WGW.

**XI. CAPACITY/ INDEPENDENT CONTRACTOR**

- A. In providing the Service under this Agreement it is expressly agreed that WGW is acting as an independent contractor and not as an employer. WGW and the Host acknowledge that this Agreement does not create a partnership or joint venture between them, and is exclusively a contract for service.

**XII. CANCELLATION AND CONTINGENCIES**

- A. WGW will be the sole decision maker on whether or not a workshop will be cancelled due to weather or a similar event.
- i. This decision is typically based on whether the venue will remain open at the time of the workshop.
  - ii. In the event that WGW must cancel a workshop due to weather, the Host agrees to work with WGW to reschedule the workshop to an alternative date.
- B. Once an agreement is made between the Host and WGW regarding a date(s) and location(s), should the Host cancel, the following cancellation fees will apply:
- i. If the Host cancels the workshop within 14 days prior to the first date of the two workshops, there will be a cancellation fee assessed to the credit card on file of up to \$3,000.00.
  - ii. Venue cancellation fees, if any will also be charged to the credit card on file.
  - iii. A portion of this cancellation fee can be waived if WGW is able to book the workshop with another Host, or if no marketing expenses or room rental costs have yet to be incurred.

**XIII. COMPLIANCE/RELEASE/INDEMNITY**

- A. It is the responsibility of the Host to verify with their own broker dealer in regards to compliance. WGW will not be responsible for any compliance issues that occur before, during, or after the workshop. The Host acknowledges and agrees that WGW is not an advisor of legal, tax, accounting or regulatory matters. The Host represents and warrants that any information provided to attendees before, during, or after the workshop will be accurate and complete. WGW is not assuming responsibility for the accuracy or completeness of any information, whether publicly available or otherwise, provided to the attendees before, during, or after the workshop.
- B. The Host, for itself and on behalf of its agents, representatives, successors, and assigns, hereby release, settle, waive and forever discharge and covenant not to sue WGW, and its owners, agents, representatives, successors, and assigns, jointly or severally from any and all manner of actions, causes of actions, claims, rights, charges, suits, damages, debts, demands, obligations, attorney's fees, and liabilities or claims of whatsoever nature, whether in law or equity, known or unknown, which the Host had, have or may have resulting from any manner, transaction or occurrence through the date of the last workshop. WGW shall not have any liability (whether direct or indirect, in contract, tort, or otherwise) to Host for or in connection with WGW's performance of the Services hereunder. Furthermore, the Host acknowledges and agrees to indemnify, defend and hold WGW and its agents, representatives, successors, employee, and assigns harmless from and against any and all claims, demands, and liabilities, judgements, damages, settlements and expenses (including, without limitation, reasonable attorney's fees) arising out of or related to:
- i. The Services provided hereunder
  - ii. A breach of this Agreement by the Host
  - iii. Denial of attendees (or any related party thereto) Social Security benefits or claims based upon information provided before, during, or after the workshop; and or any and all claims by an attendee (or any related party thereto) related to the workshop, including, but not limited to, any claims relation to financial loss of any attendees (or any related party thereto).
- C. The provisions of sections XIII. A-C shall survive in perpetuity.

In terms of this agreement are acceptable to you, please acknowledge your agreement by signing and returning this Host Agreement to your WGW Sales Representative. If the signed contract is not received back within two weeks of being sent, we will begin to search for other Hosts in your area.

X \_\_\_\_\_

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

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

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

\_\_\_\_\_

Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

X \_\_\_\_\_

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

**Lauren A. Ruhle**

White Glove Workshops  
Chief Operating Officer