



REO, LLC / Referral Exchange Organization™

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Name: _____ Years in business: _____

Company: _____ Title: _____

Work address: _____ City: _____ Zip: _____

Home address: _____ City: _____ Zip: _____

Email address (required): _____

Business Phone: (_____) _____ Mobile: (_____) _____

Home Phone: (_____) _____ Fax: (_____) _____

My target market is (check one) [] Business to Business (B2B) [] Business to Consumer (B2C) [] Business to Both (B2M)

Classification in REO (specific product/service): _____

My ideal client is: (be specific): _____

A non-competitive related profession that reaches my market? (ie: realtor & mortgage): _____

What will you contribute to this team? (use separate page if needed) _____

My goals for being a REO member: _____

What social networks are you involved in? _____

Names of 3 previous employers or businesses: _____

• What have you participated in? (names not acronyms)

Table with 3 columns: Activity (Chambers, Hobby groups, Professional groups, Referral groups, Service clubs, Social groups, Charitable groups), How long a member?, Served in leadership role as:

• Authorize REO to check character & reputation (supply names of 3 Non-REO members)

Form for authorizing REO to check character & reputation, including fields for Name, Company, Phone, Mobile, and Relationship (Social/Business) with years known.

Rank the following shapes in order of preference (1-best; 4-least): [] [] [] []



• **Agree to Terms of Membership:** *Not all applicants are accepted or inducted*

• **By making this Request to Apply I understand that if accepted to a REO team:**

a) I agree to participate in a **3-month probation** period by **doing** the following:

- | | |
|---|--|
| <input type="checkbox"/> 1. attend 11 of 13 meetings w/alternate for planned absences | <input type="checkbox"/> 4. attend a minimum of 4 partner meetings |
| <input type="checkbox"/> 2. attend a minimum of 2 referral trainings | <input type="checkbox"/> 5. invite a minimum of 3 qualified visitors (1 p/month) |
| <input type="checkbox"/> 3. give one REO introduction (see referral report) | <input type="checkbox"/> 6. arrive 10 minutes early: greet members and guests |

please initial each statement above showing that you have actually read them and understand them

b) I will comply with team's decision about my membership at the completion of my probationary period. The team may:

1. extend an invitation for induction to the team to become a **REO** Green Standard Partner
2. deny **REO** team membership (*Initiation fee is non-refundable. You may apply to other teams without additional initiation fees.*)
3. extend my probationary period by 1 month to complete probation tasks (*one time extension*)

• **Acceptance or Induction to a REO team is NEVER guaranteed** •

• Upon **induction** to REO, I agree to **meet** or **exceed** the **Green Standard for a REO Partner** each quarter as outlined below:

COMMITMENT

- a) attend 11 of 13 meetings p/ quarter with maximum 12 absences p/yr
- b) provide a minimum of 2 REO referrals (introductions) p/quarter
- c) invite a minimum of 3 guests per quarter (1 per month)

CONNECTION

- a) make the highest quality introductions whenever possible
- b) arrange 6 partner meetings per quarter
- c) serving on the REO board at some time during my membership

CHARACTER

- a) abide by my professions ethical standards and continue training
- b) share complaints about any REO member directly with the board; NOT with other team members
- c) making timely team assessment payments of \$ _____
* Assessment is not paid to REO, LLC

CALIBER

- a) complete 1 Referral Track per quarter of gross REO receipts (within professional ethical guidelines)
- b) adhere to REO policies and procedures
- c) following the **REO Golden Rule: Do for Others What You Want Them to Do for You - And Do It First!**

My signature here states that I have READ, understand and agree to the the terms of membership (as listed above):

Signature _____

Print Name _____

• **Submit this Request to Apply:** *give completed request to team's Membership Chair*

Individual Members Only!

Only individuals are members of REO. A company may pay (or reimburse) an employee for REO membership, however, REO membership is "owned" by the individual (REO does not track who paid for memberships). If the member leaves a company during the term of REO membership the individual member may elect to:

- A) allow a representative from the company to complete the term of membership. The employee replacing the member must submit to the application process and acceptance is not guaranteed. OR,
- B) complete the term of the membership themselves.

****If the REO member goes to work for a competitor, the member has the right to continue as a member.**

Payment Information & Terms:

- **Initiation Fee:** *Once accepted, processed immediately and is non-refundable.*
- **Dues:** *will automatically be debited from credit/debit card on the 1st of each month.*
- **Membership Termination:** *YOU are responsible for informing REO, LLC to discontinue automatic debit if your membership is terminated for any reason. Notification must be received IN WRITING at least 48 hours prior to the 1st of the month or you'll be responsible for the continuing debit. Debits will continue until client notifies REO, LLC of termination and debits are non-refundable.*
- **Declined cards:** *a \$10 penalty will be charged at the time the debit is rerun. Accounts declined 3 consecutive months will place your membership in jeopardy.*
- **Changes:** *Notify REO, LLC immediately of changes to credit/debit card (expiration date; new/lost card; etc).*

My signature authorizes **REO, LLC** to debit my credit/debit card (check those that apply)

- Initiation Fee of \$ _____ OR a check is attached: ck # _____
 monthly dues of \$ _____ (this monthly fee will never increase as long as you are a member)

Debit/Credit: Visa MC Discover AmEx

Signed: _____

Date: ____/____/____

If your application is accepted, expect a call from REO, LLC to process payments referencing this account 

Last 4 digits of your credit/debit card

Checks: Add \$25 processing fee to REO, LLC. **Annual Renewals** are due annually on the month of your acceptance and will incur a \$10 late fee for each month it has not been received. Please make arrangements for corporate checks to be issued on time AND to include the \$25 processing fee.

Trade Exchanges: REO will accept the initiation fee through your barter exchange. Monthly dues must be charged to your debit card.