

DOMESTIC INDIVIDUAL

- ▶ Principal can attend all four IPI Forums
- ▶ Principal can attend two Campden Wealth NA Conferences
- ▶ Private online community on Memberlink®
- ▶ NextGen events – Principal with family member can attend
- ▶ Women of Wealth Forum
- ▶ Direct Investment workshops
- ▶ Targeted roundtable discussions in North America
- ▶ “New” Dallas Forum
- ▶ Regional activities
- ▶ Domestic surveys and in-depth research reports
- ▶ *Campden FB* and *Campden FO* magazine subscriptions
- ▶ Real-time news on family office and family wealth issues
- ▶ Latest wealth management intelligence
- ▶ Archived handouts, recordings, surveys & white papers
- ▶ IPI@25 commemorative events

DOMESTIC FAMILY

- ▶ All four IPI Forums for two individuals
- ▶ Two Campden Wealth NA Conferences
- ▶ Private online community on Memberlink®
- ▶ NextGen events – Any members may attend with Next Gen
- ▶ Women of Wealth Forum
- ▶ Direct Investment workshops
- ▶ Targeted roundtable discussions in North America
- ▶ “New” Dallas Forum
- ▶ Regional activities
- ▶ Domestic surveys and in-depth research reports
- ▶ *Campden FB* and *Campden FO* magazine subscriptions
- ▶ Real-time news on family office and family wealth issues
- ▶ Latest wealth management intelligence
- ▶ Archived handouts, recordings, surveys & white papers
- ▶ IPI@25 commemorative events

GLOBAL INDIVIDUAL

- ▶ All four IPI Forums for two individuals
- ▶ Two Campden Wealth NA Conferences
- ▶ Principal can attend all of CW conferences worldwide
- ▶ Private online community on Memberlink®
- ▶ NextGen events – Any members may attend with Next Gen
- ▶ Women of Wealth Forum
- ▶ Direct Investment workshops
- ▶ Targeted roundtable discussions in NA and worldwide
- ▶ “New” Dallas Forum
- ▶ Regional activities
- ▶ Global and domestic surveys and in-depth research reports
- ▶ *Campden FB* and *Campden FO* magazine subscriptions
- ▶ Real-time news on family office and family wealth issues
- ▶ Latest wealth management intelligence
- ▶ Archived handouts, recordings, surveys & white papers
- ▶ IPI@25 commemorative events

GLOBAL FAMILY

- ▶ All four IPI Forums for two individuals
- ▶ Two Campden Wealth NA Conferences
- ▶ Two individuals can attend all of CW conferences worldwide
- ▶ Private online community on Memberlink®
- ▶ NextGen events – Any members may attend with Next Gen
- ▶ Women of Wealth Forum
- ▶ Direct Investment workshops
- ▶ Targeted roundtable discussions in NA and worldwide
- ▶ “New” Dallas Forum
- ▶ Regional activities
- ▶ Global and domestic surveys and in-depth research reports
- ▶ *Campden FB* and *Campden FO* magazine subscriptions
- ▶ Real-time news on family office and family wealth issues
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- ▶ IPI@25 commemorative events

MEMBERSHIP APPLICATION 2017

IPI connects investors to one another inside a private online community and at events throughout the year, seeking to change the way investors work with advisors and advisors work with investors, for the benefit of both.

MEMBER INFORMATION

NAME _____

COMPANY _____

MAILING ADDRESS _____

CITY _____

STATE / PROVINCE _____

ZIP / POSTAL CODE _____

COUNTRY _____

TELEPHONE _____

EMAIL _____

COMMUNICATION PREFERENCES: EMAIL MAIL BOTH

YOUR ROLE: PRINCIPAL FAMILY OFFICE EXECUTIVE
 BOTH A PRINCIPAL AND A FAMILY OFFICE EXECUTIVE
 OTHER _____

DOMESTIC

- 12-month Domestic Individual Membership: \$9,930
- 24-month Domestic Individual Membership: \$18,867, a savings of \$993

- 12-month Domestic Family Membership: \$11,900
- 24-month Domestic Family Membership: \$22,610, a savings of \$1,190

GLOBAL

- 12-month Global Individual Membership: \$13,240
- 24-month Global Individual Membership: \$25,156, a savings of \$1,324

- 12-month Global Family Membership: \$16,520
- 24-month Global Family Membership: \$31,388, a savings of \$1,652

AGE:

- 20-30
- 30-40
- 40-55
- 55-70
- Wise beyond years

WHAT IS YOUR RELATIONSHIP TO THE ORIGINAL SOURCE OF WEALTH?

- I am the wealth creator
- Second generation
- Third generation
- Fourth generation
- Fifth generation
- Family Office Executive

IS THERE A NEXT GEN MEMBER IN YOUR FAMILY?

- Yes
- No

WHAT IS YOUR FAMILY'S NET WORTH?

- Less than \$50 million
- \$50 million - \$100 million
- \$101 million - \$300 million
- \$301 million - \$500 million
- \$500 million - \$1 billion
- More than \$1 billion

DO YOU UTILIZE A FAMILY OFFICE STRUCTURE?

- Yes, Single Family Office
- Yes, Multi-Family Office
- No, but I am considering one
- No

DO YOU OWN AN OPERATING BUSINESS?

- Yes
- No

ARE YOU IVORY SNOW?

a private investor member who has no professional affiliation, product or service offering

- Yes
- No

WHAT ARE YOUR AREAS OF INTEREST?

- Real Estate
- Venture Capital
- Buy-outs
- Emerging Markets
- Hedge Funds
- Co-Investments
- Setting up a Family Office
- Monitoring an Existing Family Office
- Philanthropy
- Governance
- Introduction to Peers
- Introductions to Experts
- Other _____

ARE YOU INTERESTED IN THE WHARTON PRIVATE WEALTH MANAGEMENT PROGRAM?

- Yes
- No
- Already Attended

MEMBERSHIP AGREEMENT

The code of conduct of a safe harbor is that members do not solicit other members for investments or services. We ask all members, guests and speakers to respect this non-commercial tradition and refrain from giving even informal investment presentations or making solicitations of any kind. Exchanging business cards is entirely appropriate. All IPI members, both new and veterans, agree to preserve this safe harbor.

An important feature of the IPI Code of Conduct is that private investor members are polite and professional in their interaction with all members. This includes welcoming advisors or speakers into the community of learners and respecting their interest in receiving feedback on forum presentations or their RFI responses.

Investor Conversations on Memberlink® – The freedom to ask, and the assurance of an ivory snow reply – all within a confidential, private network – are the foundation of the safe harbor on Memberlink®. Use your judgment when criticizing an advisor or fellow member; no “flaming.” Never print out and / or forward dialogues to anyone other than your own family / family office. IPI is not responsible for the views expressed or any actions taken as a result of information shared on Memberlink®. IPI does not edit or otherwise perform due diligence on the responses. Please remember that a member’s opinion may be biased. IPI urges members to perform their own extensive due diligence.

The value of the IPI network and community is greatly enhanced by the participation of members. IPI hopes you will complete at least one IPI survey per year, and if possible, answer or ask a question online at least once a year.

To maintain the integrity of the membership, IPI asks all members to disclose affiliations annually. Please complete the following and sign:

1. Are you employed by a financial services, brokerage, financial consulting, money management or investment firm? YES NO
2. Are you a general partner in an investment limited partnership that is open to, or includes, non-family limited partners? YES NO
3. If you have a family office, is it open to anyone other than your family? YES NO
4. Has your office / fund / firm added any new investors / clients (other than your own family) in the last five years? YES NO
5. Are you on an advisory board or do you have an economic relationship with firms in questions 1, 2 or 3? YES NO

By signing below, I agree to abide by the Code of Conduct and have completed the membership information and affiliation disclosure. Should any of this information change, I will notify IPI immediately.

SIGNATURE: _____

DATE: _____

PAYMENT METHOD (CHECK ONE PLEASE)

Your membership is on a calendar-year basis and you may elect to receive a 5% discount by selecting the 24-month membership.

- 12-Month Membership 24-Month Membership (5% discount)

For convenience, would you like us to automatically charge your membership fee in accordance with the below instructions at the close of each membership year? You have the option to cancel at the close of any membership year by contacting our team. Any rate increases or benefit changes will be communicated in advance of any charge.

- Yes No

- PAYMENT ENCLOSED INVOICE PLEASE VISA
 AMERICAN EXPRESS MASTERCARD CALL ME FOR CREDIT CARD DETAILS (phone#) _____

CARD NUMBER: _____

EXPIRATION DATE: _____

NAME: _____ EMAIL: _____

SIGNATURE (REQUIRED): _____

- Please add my family’s NextGen to the membership (at no additional cost with family membership)**

NAME: _____ EMAIL: _____

NAME: _____ EMAIL: _____



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