



Application for Membership of the Principa Alliance

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APPLICATION FOR MEMBERSHIP TO THE PRINCIPA ALLIANCE

THANK YOU FOR YOUR MEMBERSHIP APPLICATION TO THE PRINCIPA ALLIANCE. BY COMPLETING AND RETURNING THIS APPLICATION FORM, YOU ARE AGREEING TO THE TERMS AND CONDITIONS OF THE PRINCIPA ALLIANCE AS SET OUT ON PAGE 2 AND SCHEDULE A OF THIS DOCUMENT. WE'RE DELIGHTED YOU HAVE ELECTED TO BECOME A MEMBER OF THE PRINCIPA ALLIANCE AND WE LOOK FORWARD TO A LONG AND MUTUALLY REWARDING PROFESSIONAL RELATIONSHIP. PLEASE PROVIDE US WITH THE FOLLOWING MEMBER INFORMATION:

FIRM NAME:

STREET NAME/NUMBER:

SUBURB AND CITY:

STATE/REGION:

COUNTRY:

POSTCODE/ZIP:

TELEPHONE:

FAX:

MEMBERSHIP TYPE REQUESTED:

- PRINCIPA ALLIANCE: BASE REFER TO SCHEDULE A.1 FOR BENEFITS INCLUDED
 PRINCIPA ACCOUNTANTS' ALLIANCE REFER TO SCHEDULE A.2 FOR BENEFITS INCLUDED
 PRINCIPA ADVISORS' ALLIANCE REFER TO SCHEDULE A.3 FOR BENEFITS INCLUDED

FIRM CONTACTS

PLEASE COMPLETE THE FOLLOWING INFORMATION:

PRIMARY CONTACT:

EMAIL ADDRESS:

ADDITIONAL CONTACT 1:

EMAIL ADDRESS:

ADDITIONAL CONTACT 2:

EMAIL ADDRESS:

MEMBER APPLICATION AUTHORITY

I AGREE TO THE TERMS AND CONDITIONS AS SET FORTH ON PAGE 2 AND SCHEDULE A OF THIS APPLICATION MEMBERSHIP OF THE PRINCIPA ALLIANCE.

SIGNED:

POSITION TITLE:

DATE:

PRINCIPA OFFICE USE ONLY

Conditions:

Commencement:

CLSV:

ADMN:

ACCT:

(Principa Team: Each department needs to date and initial above relevant section after completion.)

1. MEMBER PAYMENTS

The Member agrees to pay the monthly membership fees as set out in Schedule A by the nominated billing date of each month (either the 5th or the 20th). Member agrees to make all payments when due via the method set out in Schedule A, unless otherwise agreed in writing. Principa shall charge interest at the rate of 1½ % per month (or the maximum permitted by law), whichever is less, on any late payments. Principa reserves the right to increase the membership fee upon 90 days written notice to the Member. If Principa seeks the assistance of legal counsel to collect any delinquent payments, Member agrees to pay all reasonable attorneys' fees and costs incurred by Principa.

2. MEMBERSHIP RIGHTS

As a Member of Principa, you have the non-exclusive, revocable and limited right to: (i) use Principa's products, services and resources solely in the manner contemplated by this agreement and in accordance with the end user license agreements applicable for all software and websites published or distributed by Principa. (ii) represent to the public that you are a member of the Principa Alliance and to use Principa's name, logo and trademark for the sole purpose of conveying your membership in the Principa Alliance, provided, however, that any and all of the Member's material bearing Principa's name, logo and/or trademark shall first be submitted to Principa for approval, which approval may be withheld by Principa in its sole discretion.

Membership may only be used for the benefit of the Member and only in the manner described in this Paragraph 3. Membership may not be used to provide services to, or for the benefit of, another non-member firm or individual. These membership rights are not intended to, and should not be construed to, give the Member any ownership or proprietary rights in Principa's services, products, logos, trademarks or name, all of which shall, at all times, remain the exclusive property of Principa.

3. PRINCIPA'S REPRESENTATIONS AND WARRANTIES.

Principa represents and warrants that it: (i) has the qualifications and skills to provide to the Member the services and products offered with this membership. (ii) will provide the services in a competent and professional manner. (iii) is authorized to enter into this membership with the Member and to provide the services and products contemplated hereunder without the need for consent by any third party. (iv) will keep all confidential and proprietary information belonging to the Member in strict confidence and will not disclose it to any 3rd party other than as contemplated hereunder by your membership in the Principa Alliance or as required by applicable law.

4. CONDITIONS FOR MAINTAINING MEMBERSHIP

In addition to the payment obligations set forth in Paragraph 1 above, as a Member of the Principa Alliance, the Member agrees to: (i) Maintain, at its own expense, professional liability insurance in those amounts and types sufficient to cover any claims, suits, actions, liabilities, costs and expenses that may arise from the Member's business practices. (ii) Allow Principa at its absolute discretion to communicate with the member and any employees of the member via email or any other form. (iii) Permit Principa to publicly refer to the Member as a member of the Principa Alliance and to the disclosure by Principa of certain of the Member's identifying information in its Members Directory. (iv) Maintain its practice in the highest professional standard for accounting and business consultants. (v) Not to compete (directly or indirectly) with the activities, services or products of Principa or to use Principa's services, products and logos in a manner that is competitive with Principa. (vi) Keep all confidential and proprietary information belonging to Principa in strict confidence and not disclose said information to any 3rd party other than as expressly contemplated by your membership in the Principa Alliance or as required by applicable law. (vii) Indemnify, defend and hold Principa (including, its employees, directors, agents and officers) from and against all claims, losses, damages and expenses, including reasonable attorneys' fees, of any kind or nature resulting from an action or claim by a 3rd party arising out of or related to the Member. (viii) Not to hold itself out as a Certified Principa Solution Provider until it has attended and graduated from an approved program conducted by Principa University.

5. TERM & TERMINATION.

This term of this Membership is for twelve (12) months, which term shall automatically renew for an additional 12-month period unless otherwise terminated by either party in accordance with this agreement.

Either party may terminate this Membership by giving the other written notice within 30-days prior to the end of term. If the Member terminates, it may not reapply for membership until six (6) months after the termination date. Principa may also terminate the Member's membership, immediately, if: in Principa's sole opinion, the Member has failed to satisfactorily comply with any of the conditions set forth in Paragraph 4; the Member has failed to timely make its monthly membership payments; or the Member otherwise breaches any other terms of Membership as set forth herein.

Upon termination for any reason, by either party, Principa shall be entitled to all membership payments received or due as of the termination date. In addition, all rights granted by this membership shall immediately terminate and the Member shall no longer be entitled to use Principa services or products, including our logos, name or trademarks, and may no longer hold itself out to the public as being affiliated with Principa. Upon termination Member shall immediately destroy/erase all copies of any content including software obtained from Principa prior to or during the period of membership.

6. DISCLAIMER OF WARRANTIES/ LIMITATION OF LIABILITY.

PRINCIPA'S SERVICES AND PRODUCTS ARE PROVIDED TO THE MEMBER ON AN "AS-IS" BASIS. PRINCIPA MAKES NO WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR PARTICULAR PURPOSES (EVEN IF PRINCIPA WAS INFORMED OF ANY SAID PURPOSES). PRINCIPA ASSUMES NO RESPONSIBILITY FOR ANY LOSS OR DAMAGE (INCLUDING, WITHOUT LIMITATION, DIRECT, INDIRECT, COMPENSATORY, CONSEQUENTIAL (I.E. LOST PROFITS OR LOST BUSINESS OPPORTUNITIES) AND PUNITIVE DAMAGES) RESULTING FROM MEMBER'S USE OF PRINCIPA'S SERVICES, PRODUCTS, LOGOS AND/OR NAME. IN THE EVENT THAT THE FOREGOING DISCLAIMER IS FOUND INSUFFICIENT TO ELIMINATE ALL OF PRINCIPA'S LIABILITY HEREUNDER, THE MEMBER AGREES THAT UNDER NO CIRCUMSTANCES WILL PRINCIPA'S LIABILITY TO THE MEMBER HEREUNDER EXCEED AN AMOUNT EQUAL TO THE TOTAL MEMBERSHIP FEES PAID BY THE MEMBER FOR THE 12 MONTHS PRIOR TO SAID LOSS OR DAMAGE.

7. GENERAL TERMS

- This Agreement is made under, and shall be construed in accordance with the Federal, State and/or Territorial laws as applicable to the region in which the member is resident. The parties agree to submit to courts of competent jurisdiction in such region for any matter arising from this Membership or any documents related thereto. In the event of such a dispute, the prevailing party shall be entitled to receive from the other party all reasonable collection, court, accounting, attorneys' and other professional fees incurred by the prevailing party to enforce its rights hereunder. This Agreement shall be binding upon and inure to the benefit of the parties hereto, their heirs, legal representatives, and successors: provided, however that no Member may assign this membership to another party without the prior written consent of Principa. Principa however may assign its duties hereunder to any of its affiliates. The Application for Membership, these Terms and Conditions (and any exhibits hereto) shall constitute the complete agreement and understanding of the parties with respect to membership in the Principa Alliance, and supersede all prior and contemporaneous representations and/or agreements. Principa reserves the right to make commercially reasonable changes to the services, products and the membership at its discretion with 10 days notice to the Member. If any provision of this membership agreement shall be determined by a court of competent jurisdiction to be invalid, unlawful or unenforceable, then such provision shall become void and severable from the remaining provisions, which remaining provisions shall continue to be binding upon the parties hereto and continue in full force and effect. Nothing in the membership shall constitute, or be construed to constitute, Member and Principa as an agent, employee, or partner of the other, nor shall this membership be construed as a joint venture or a franchise. A waiver by any either party to any breach or default by the other party under this membership agreement shall not be considered a waiver of any subsequent breach or default of the same or other provision hereunder or of any other rights possessed by the waiving party under this membership agreement. This membership agreement may be executed in several counterparts and by original or facsimile signature, each of which part and signature will be deemed original, all of which will constitute one and the same instrument. All notices to be provided under this membership agreement to any party shall be in writing and shall be deemed effectively delivered: (1) upon personal delivery to the addressee; or (2) 5 days after mailed by certified or registered mail, postage pre-paid, addressed to the intended recipient at the last address provided by the recipient. The Member agrees to do and perform any and all further acts that Principa may deem reasonably necessary or advisable to accomplish the purpose of membership in the Principa Alliance.

Please initial in the check box to indicate that you have read and understood the terms and conditions outlined. ➡

Application for Membership of the Principa Alliance Schedule A

MEMBERSHIP CLASSIFICATION PURSUANT TO SECTION 1 OF THE APPLICATION FOR MEMBERSHIP OF THE PRINCIPA ALLIANCE (PLEASE SELECT ONE OF THE FOLLOWING BY INITIALING)	
MEMBER INITIALS	MEMBERSHIP TYPE
<div style="border: 1px solid black; width: 80px; height: 60px; margin: 0 auto;"></div>	<p>A.1 PRINCIPA ALLIANCE- BASE: As a paying member of the Principa Alliance Base Group you will be entitled to use the following:</p> <ul style="list-style-type: none"> ▪ DELTA 4 PRACTICE DEVELOPMENT SYSTEM ▪ FIRMPPLAN™ PRACTICE ANALYSIS SOFTWARE ▪ BUSINESS DASHBOARD™ (OPTIONAL RESOURCE - ADDITIONAL LICENSE FEES APPLY)
<div style="border: 1px solid black; width: 80px; height: 60px; margin: 0 auto;"></div>	<p>A.2 PRINCIPA ACCOUNTANTS' ALLIANCE: As a paying member of the Principa Alliance Accountants' Group you will be entitled to use the following:</p> <ul style="list-style-type: none"> ▪ DELTA 4 PRACTICE DEVELOPMENT SYSTEM ▪ DELTA4 PEOPLE SYSTEM ▪ DELTA4 MARKETING SYSTEM ▪ FIRMPPLAN™ PRACTICE ANALYSIS SOFTWARE ▪ SERVICEPLAN MENU OF SERVICES APPLICATION ▪ PHONE RIGHT TEAM TRAINING PROGRAM – ONLINE RESOURCE ▪ TOWARDS AWESOME SERVICE TRAINING PROGRAM – ONLINE RESOURCE ▪ SELECTED PRINCIPA U ONLINE LEARNING MODULES ▪ BUSINESS DASHBOARD™ (OPTIONAL RESOURCE –ADDITIONAL LICENSE FEES APPLY) ▪ PRINCIPEDIA – WIKI KNOWLEDGE BASE ▪ MEMBER DIRECTORY LISTING ▪ IMPLEMENTATION SUPPORT
<div style="border: 1px solid black; width: 80px; height: 60px; margin: 0 auto;"></div>	<p>A.3 PRINCIPA ADVISORS' ALLIANCE: As a paying member of the Principa Alliance Advisors Group you will be entitled to use the following:</p> <ul style="list-style-type: none"> ▪ GAMEPLAN™ BUSINESS ANALYSIS SOFTWARE ▪ BUSINESS DASHBOARD™ (1 X LICENSE INCLUDED IN MEMBERSHIP. ADDITIONAL LICENSE FEES APPLY FOR EXTRA LICENSES) ▪ FIRMPPLAN™ PRACTICE ANALYSIS SOFTWARE ▪ DELTA 4 PRACTICE DEVELOPMENT SYSTEM ▪ DELTA4 PEOPLE SYSTEM ▪ DELTA4 MARKETING SYSTEM ▪ DELTA4 MARKETING PLUS LIBRARY ▪ DELTA 4 ADVISOR SYSTEM ▪ INTRODUCING CONSULTING SERVICES SYSTEM ▪ DELTA4 BUSINESS ANALYSIS & DISCOVERY TOOLS ▪ HARVARD MANAGEMENTOR MODULES (ONE USER LICENSE PER FIRM) ▪ INDUSTRY RESEARCH & IDEAS LIBRARY ▪ 18 BUSINESS LEVERAGE POINTS ▪ PHONE RIGHT TEAM TRAINING PROGRAM - ONLINE ▪ TOWARDS AWESOME SERVICE TEAM TRAINING PROGRAM – ONLINE RESOURCE ▪ BUILDING A BETTER BUSINESS TEAM TRAINING PROGRAM – ONLINE RESOURCE ▪ FIRST STEPS CLIENT PROGRAM – DVD RESOURCE ▪ PRACTICAL FINANCIAL MANAGEMENT AUDIO TRAINING PROGRAM ▪ STRATEGIC PLANNING SESSION AUDIO TRAINING PROGRAM ▪ SELECTED PRINCIPA U ONLINE LEARNING MODULES ▪ PRINCIPEDIA – WIKI KNOWLEDGE BASE ▪ MEMBER DIRECTORY LISTING ▪ IMPLEMENTATION SUPPORT

PAYMENT INFORMATION PURSUANT TO SECTION 1 OF THE APPLICATION FOR MEMBERSHIP OF THE PRINCIPA ALLIANCE

(PLEASE SELECT THE APPLICABLE REGION FROM THE FOLLOWING LIST BY CHECKING BOX)

PRINCIPA ALLIANCE: BASE GROUP

	REGION	GETTING STARTED KIT ONE-TIME PAYMENT	MEMBERSHIP FEE (INCLUSIVE OF APPLICABLE TAXES) AND REQUIRED PAYMENT METHOD.
<input type="checkbox"/>	Australia	-	AU\$ 544.50 Yearly via Direct Debit
<input type="checkbox"/>	New Zealand	-	NZ\$ 495.00 Yearly via Direct Debit
<input type="checkbox"/>	USA	-	US\$ 495.00 Yearly via Direct Debit
<input type="checkbox"/>	Canada	-	CA\$ 495.00 Yearly via Direct Debit
<input type="checkbox"/>	United Kingdom	-	GB£ 346.63 Yearly via Standing Order
<input type="checkbox"/>	Malaysia	-	RM 1,065.00 Yearly via Standing Order

PRINCIPA ALLIANCE: ACCOUNTANTS' GROUP

	REGION	GETTING STARTED KIT ONE-TIME PAYMENT	MEMBERSHIP FEE (INCLUSIVE OF APPLICABLE TAXES) AND REQUIRED PAYMENT METHOD.
<input type="checkbox"/>	Australia	AU\$ 764.50	AU\$ 324.50 Monthly via Direct Debit
<input type="checkbox"/>	New Zealand	NZ\$ 695.00	NZ\$ 295.00 Monthly via Direct Debit
<input type="checkbox"/>	USA	US\$ 695.00	US\$ 295.00 Monthly via Direct Debit
<input type="checkbox"/>	Canada	CA\$ 695.00	CA\$ 295.00 Monthly via Direct Debit
<input type="checkbox"/>	United Kingdom	GB£ 417.13	GB£ 211.50 Monthly via Standing Order
<input type="checkbox"/>	Malaysia	RM 2,275.00	RM 635.00 Monthly via Standing Order

***Note: The first months membership + New Member Getting Started fee will be paid by Credit Card to activate your membership.**

PRINCIPA ALLIANCE: ADVISORS' GROUP

	REGION	GETTING STARTED KIT ONE-TIME PAYMENT	MEMBERSHIP FEE (INCLUSIVE OF APPLICABLE TAXES) AND REQUIRED PAYMENT METHOD.
<input type="checkbox"/>	Australia	AU\$ 1,094.50	AU\$ 544.50 Monthly via Direct Debit
<input type="checkbox"/>	New Zealand	NZ\$ 995.00	NZ\$ 495.00 Monthly via Direct Debit
<input type="checkbox"/>	USA	US\$ 995.00	US\$ 495.00 Monthly via Direct Debit
<input type="checkbox"/>	Canada	CA\$ 995.00	CA\$ 495.00 Monthly via Direct Debit
<input type="checkbox"/>	United Kingdom	GB£ 599.25	GB£ 346.63 Monthly via Standing Order
<input type="checkbox"/>	Malaysia	RM 3,250.00	RM 1,065.00 Monthly via Standing Order

***Note: The first months membership + New Member Getting Started fee will be paid by Credit Card to activate your membership.**

Please initial in the checkbox to indicate that you have read and understood the terms and conditions outlined. 