



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

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

Charter Partner - \$50,000/year

- Automatic underwriter of the Retirement Confidence Survey.
- 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) – 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.
- 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) – 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) – 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

Or, visit www.asec.org