

## **HERITAGE DESIGN PROFESSIONAL® COACHING PROGRAM**

*Transformation does not come from doing things bigger, better, faster, or doing more of it.  
Transformation comes from starting from a different place.<sup>1</sup>*

Heritage Design and the Heritage Design Professional Coaching Program start from a different place. It will give you the tools, skills, competencies, and practice that leads to the confidence necessary to achieve your desired outcomes and the outcomes of your clients and their families.

**This coaching program is for successful professionals who desire to take their practice and their donor/client relationships to the next level.** For many professionals, the “next level” means increasing their profits or philanthropic gifts, increasing their retention, making a bigger difference in their clients’ lives, and/or working with higher net worth families.

When you ask donors/clients what they want for themselves and their families, many describe their desire for confidence in their own lives, that their family thrives together for multiple generations, and that each successive generation to be prepared for the inheritances they will receive. **Unfortunately, research shows (and our experience confirms) that only 10% of families attain those desired outcomes, despite quality financial and estate planning.**

Helping your donors and clients (and their families) attain their desired outcomes builds a unique bond between you and your donors and clients because it gives them what they are looking for/demanding. It also increases your profits or philanthropic gifts, your retention, and the number of quality introductions you receive from your current relationships.

Our most active Members say the training they received through this Coaching Program has:

- Distinguished them from their competition;
- Increased their profits, retention, and engagements of new “A” donors/clients;
- Equipped them to build deeper relationships;
- Created multi-generational engagements; and
- Increased philanthropic gifts or the value of their practice.

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<sup>1</sup> Carter, Doug. Clients Forever. McGraw-Hill. 2003



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The program includes topics listed below delivered through video recorded segments, virtual training sessions, and in-person coaching sessions, plus coaching calls, flex calls, a mid-term session group video conference, and pre- and post-session assignments. Also included are copies of the books *Beating the Midas Curse* and *What Matters*, certification in the Stratton ILS, Expectations Conversation, Quantification Activity, and other assessments to understand your leadership and communication styles, plus you will experience and practice what you are being trained to do.

The training sessions include:

- **The Guided Discovery Process®: Guided Discovery and Heritage Statements™**
- **Creating Purpose Statements**
- **Building Your Practice**
- **Live Cases**
- **Heritage Milestones**
- **Activities**
- **2 In-person Labs**

The following are prerequisites to completing your certification:

- **Better Listening, Better Questions, Better Relationships\***
- **Alignment Milestones: For Families, Businesses, and Organizations\***

\*These sessions may include other professionals who are not enrolled in the HDP Coaching Program.

As part of your Coaching Program investment, you will receive a limited intellectual property (IP) license to use our IP you received during your coaching sessions. You will also have the right to attend any other Advanced Training Sessions at a discounted tuition and tuition-free attendance to our Annual Conference & Awards Dinner, with access to the THI Member Community and your Training Teams on Knowledge Vault, our private online training platform & library.

Once you have completed your HDP™ Certification, you will have access to the Certified Members Team Library and be eligible to attend the Master HDP Advanced Coaching Sessions. Here is where you will reach mastery plateaus, continue to refine the roles you desire to execute, and build and facilitate the collaborative team of professionals to fulfill all of the other roles. Our certification provides assurances to your clients that you are both trained and proficient in Heritage Design. You only become and remain proficient if you actively apply your Heritage Design training (which is why there are both ongoing experience and continuing education requirements to maintain your certification).



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Also, as part of your Certified Member fee as a Master HDP, you receive a full IP license to use our intellectual property. You enjoy tuition-free attendance at our Annual Conference and Awards Dinner. As a Certified Member in Good Standing, you have the right to use the Heritage Design Professional designation.

**The Heritage Institute is a community within which professionals can prepare for and experience their most desired professional and personal outcomes.**

We have been described as the world's foremost authority on creating successful multi-generational families through a process that builds a culture in the family of communication, trust, and mentoring in the family all wrapped around the family's common purpose. And we have an unmatched wealth of intellectual property, processes, training, expertise, and resources for building deeper relationships, creating relationships with your existing donors' and clients' families, and helping your them stay together for multiple generations.

You have two options for enrolling into the Coaching Program (taking the prerequisites ala carte or integrated into the Program) and three payment options (all up-front, annual payments, or equal installment payments). Your individual coaching calls will not begin until you are accepted into this program. We have found that professionals who begin their coaching calls prior to attending either of the prerequisite Academies get more out of those Academies, so we provide a significant discount for those attendees who integrate them into the Coaching Program. Your Certification Requirements are expected to be completed by May of next year, and must be completed by the end of next year. Your tuition includes membership in the Master HDP Program from the date of your completion through the remainder of next year.



**Tuition:** The current tuition for our training is:

<b>Event</b>	<b>Live</b>	<b>Virtual</b>
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**Prerequisites:**

<i>Better Listening, Better Questions, Better Relationships</i>	\$2,495.00	\$1,995.00
<i>Alignment Milestones: For Families, Businesses &amp; Organizations</i>	\$4,595.00	\$3,995.00

**Heritage Design Professional Coaching Program**

<b>What</b>	<b>HDPC Only</b>	<b>Including Prereq.</b>
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Tuition (ala carte)	\$24,900.00	\$33,175.00 <sup>2</sup>
Tuition (integrated)		\$27,900.00
Paid in full in advance	\$23,400.00	\$26,400.00
Paid Annually	\$12,450.00	\$13,950.00
Four Installment Payments	\$ 6,600.00	\$ 7,250.00

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<sup>2</sup> Assuming in-person training.



**HERITAGE DESIGN PROFESSIONAL®**  
**COACHING PROGRAM APPLICATION**

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

Company: \_\_\_\_\_

Business Address: \_\_\_\_\_

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

Completion of the ***Better Listening, Better Questions, Better Relationships*** and ***Alignment Milestones: For Families, Businesses & Organizations*** academies are prerequisites to completing the Certification Coaching Program. You may elect to either take those academies ala carte before joining the Coaching Program or integrate them into the Coaching Program.

You have two options for enrolling into the Coaching Program (taking the prerequisites ala carte or integrated into the program) and three payment options (all up-front, annual payments, or equal installment payments). Your individual coaching calls will not begin until you are accepted into this program. We have found that professionals who begin their coaching calls prior to attending either of the prerequisite academies get more out of those academies, so we provide a significant discount for those attendees who integrate them into the Coaching Program. Your Certification Requirements are expected to be completed by May of next year, and must be completed by the end of next year. Your tuition includes membership in the Master HDP™ Program from the date of your completion through the remainder of next year.

\_\_\_\_\_ Integrated: I will attend the ***Better Listening, Better Questions, Better Relationships*** and ***Alignment Milestones: For Families, Businesses & Organizations*** academies as part of the Coaching Program (\$27,900.00); ***or***

\_\_\_\_\_ HDP Coaching Program: I have completed the ***Better Listening, Better Questions, Better Relationships*** and ***Alignment Milestones: For Families, Businesses & Organizations*** academies (\$24,900.00).



**Payment Options:**

**Integrated**

- \_\_\_\_\_ Lump Sum in Advance (\$26,400.00)
- \_\_\_\_\_ Annually Payments (\$13,950.00 each)
- \_\_\_\_\_ Installment Payments (\$7,250.00 each)

**HDP Coaching Program**

- \_\_\_\_\_ Lump Sum in Advance (\$23,400.00)
- \_\_\_\_\_ Annual Payments (\$12,450.00)
- \_\_\_\_\_ Installment Payments (\$6,600.00 each)

Coaching calls may begin as soon as your application is submitted and approved. Your payment selected above is due/will be charged upon acceptance of your application. If you select annual payments, your second annual payment will be charged on or before May 1<sup>st</sup> of next year. If you select the installment payment option, your remaining payments will be charged on September 1<sup>st</sup> of this year, March 1<sup>st</sup> and September 1<sup>st</sup> next year.

\_\_\_ **Payment by electronic check or bank draft.** If you have selected annual or installment payments, you authorize us to automatically withdraw my payments from this account in the future. If you would like to pay via electronic check or direct withdrawal from your bank, please email [admin@theheritageinstitute.com](mailto:admin@theheritageinstitute.com) to make those arrangements.

\_\_\_ **Please charge my (Check One):** \_\_\_ Visa \_\_\_ Mastercard \_\_\_ American Express

**The Heritage Institute is authorized to charge my card immediately \$2,000 as an initial deposit.** This sum will be refunded if your application is not approved. Upon acceptance of this application, The Heritage Institute is authorized to immediately charge the remaining balance of my initial payment and to charge my card the remaining balance of my fees described in my election above. I understand that I will also be charged all processing fees for these transactions. The Heritage Institute is further authorized to keep my card on file and use it for the fees described above and other items which I order from The Heritage Institute or its affiliated entities.

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CSV Code: \_\_\_\_\_

Card holder's name as it appears on the card: \_\_\_\_\_

Billing address: \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*We reserve the right to delay the start of a Coaching Program due to insufficient enrollment, inclement weather, or other events beyond our control. In the event a program is delayed, we will notify you as soon as possible. You may choose to stay enrolled in the program with the alternative dates or receive a full refund of your registration fee. The Heritage Institute will not be responsible for any costs you incur due to such delay.*



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**In order to maximize the value, you will receive from this coaching program, you agree as follows (read and initial each):**

\_\_\_ I agree to watch/attend and complete the training as shown on the attached schedule.

\_\_\_ For in-person meetings, I will make my travel arrangements to allow for me to attend the entire session. For virtual meetings, I will attend virtually for the entire session. And I understand and agree that there is no credit for missed sessions.

\_\_\_ I agree to protect The Heritage Institute's Intellectual Property, and agree that any reproduction, presentation, distribution, transmission, or commercial use of the concepts, strategies, methods, materials, and all other trademarks, in any media, now known or hereafter invented, is prohibited without the express written permission of The Heritage Institute. I agree that I shall not use any device, now existing or hereafter invented, to make an audio and/or visual recording, transmission, or broadcast of any workshop session, in whole or in part.

\_\_\_ I agree that The Heritage Institute has the right to reschedule sessions and/or substitute instructors.

\_\_\_ I understand that I should complete my Certification Requirements by May 1<sup>st</sup> of next year, and must complete my Certification Requirements by the end of next year, and that I may participate in the graduation recognition the Annual Conference following completion of my requirements.

\_\_\_ I understand that I am expected to apply what is learned through practical experiences and insights as I go, and mastery of the concepts will continue after certification and during my membership as a Master HDP.

\_\_\_ I agree that The Heritage Institute reserves the right to decline or terminate my participation in the Program for any reason at any time.



Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

**Background: In the past five years, have you (check one):**

Been the subject of any complaint or proceeding by any regulatory body or organizations? Yes No

Been suspended, expelled, fined, barred, censured or otherwise disciplined or found to have violated any law or rule by any employer or regulatory body or organization? Yes No

Been refused a license or had a license suspended or revoked by any regulatory body or organization? Yes No

Had a bonding company deny, pay out, or revoke a surety or fidelity bond for you? Yes No

Paid any sum, personally or through your employer to compromise or settle a complaint against you? Yes No

Been convicted of or plead *nolo contendere* to any felony or misdemeanor? Yes No

**If the answer to any of the preceding questions is yes, please type out and attach a detailed explanation.**

Years in Business: \_\_\_\_\_ Designations: \_\_\_\_\_

Other Qualifications: \_\_\_\_\_

Name of the THI Member(s) who recommended you: \_\_\_\_\_

Name of your Broker Dealer (if applicable): \_\_\_\_\_





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The purpose of The Heritage Institute is to help as many families as possible sustain their family wealth and unity across generations. That purpose is only fulfilled by training people who are going to help families. Our Heritage Design Certification Coaching Program is very interactive and limited in the number of people who can attend each session therefore, we will only accept people who are going to use the training and help families so please answer the following:

**What do you desire to get out of this program?**

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**How do you anticipate using the training?**

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Please list three **personal** references (Please Print Legibly):

<u>Name</u>	<u>Phone</u>	<u>State</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Please list three **professional** references (Please Print Legibly):

<u>Name</u>	<u>Phone</u>	<u>State</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

*I understand that, if this application is accepted, this Membership shall be effective for a term of one year, and will renew automatically for additional one-year terms unless it is terminated as described below. I understand that this membership may be terminated if, in the sole discretion of THI, I have failed to comply with any of the Membership qualifications, I have not maintained my practice in a manner consistent with The Heritage Process® espoused by THI, I have violated THI's Code of Ethics, or I take any action that THI deems to be not in the best interest of THI or any of its Members. I understand and agree that said determination is subjective, and will be made by THI in its sole discretion. If this Heritage Design Professional Membership Application is accepted and THI agrees to renew this Membership each year, this Membership will be automatically renewed with no further action from me. If I desire to terminate this Membership at the end of any term, I agree to provide THI with notice of said termination not less than 30 days prior to the renewal date. The renewal fees shall be at the then applicable rates (which may be modified from time to time by THI).*

*I understand that The Heritage Institute video records academies and events. I hereby authorize The Heritage Institute to use my image and/or voice as it is so recorded on its web site or in any other media as it so chooses.*

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

