

# KARDIA

FAMILY WEALTH COUNSELING

*Keeping the heart of God at the heart of planning*

## **SAMPLE**

Ministry Working Agreement between Kardia, Inc. and Kingdom Causes International

### **I. Purpose**

Whereas Kingdom Causes International of Zion, CO (hereinafter referred to as KCI) desires to provide advanced planned giving services to its constituency and, whereas, Kardia, Inc., of Mooresville, IN (hereinafter referred to as Kardia) is desirous of providing said planned giving services to the constituency of KCI, the two organizations agree to enter into this mutually binding Ministry Working Agreement (hereinafter referred to as Agreement).

### **II. Terms**

This Agreement can be canceled at any time by either party with a seven-day, advanced, written notice. This Agreement will be perpetual unless otherwise canceled as stated.

This Agreement assumes no liability of any kind on the part of KCI for any professional errors or omissions incurred by Kardia in its practice of Family Wealth Counseling.

### **III. Services and Materials Provided by Kardia**

A. Kardia agrees to assist KCI in identifying and marketing to current and potential planned giving donors through providing the following services and materials.

1. To hold a 1-day training session for all KCI Development and Executive staff to help them better understand the needs and circumstances of the most affluent ministry friends and donors and how to better relate to and effectively minister to these affluent donors.
2. To hold individual private briefings with major donors or to make small groups presentations regarding the opportunities and power of the Family Wealth Counseling process.
3. To provide a donor direct-mail identification survey.
4. To assist KCI with a detailed identification list of the characteristics and/or indications that certain individuals may be qualified, major planned giving prospects.
5. To write and provide marketing copy, promoting the benefits of planned giving (Family Wealth Counseling) which can be included in KCI promotional literature and mailing materials.
6. To provide personal coaching for KCI Executive and Development staff as they working to open the doors to their major donors for meetings with Kardia.
7. To make available copies of the book, Family Wealth Counseling: Getting to the Heart of the Matter and its promotional DVD to KCI at no cost to the ministry.

B. FWCoA agrees to donate its time for any and all of the above related activities including making personal trips to visit with current or potential KCI donors. for initial donor meetings will be covered by KCI. Expenses for any and all subsequent donor/family meetings will be negotiated between Kardia and the donor.

C. Should a KCI referral choose to retain Kardia to lead them through the Family Wealth Counseling process, Kardia agrees to reduce its normal Family Wealth Counseling fees by 50% for all services rendered to KCI referrals.

D. Kardia cannot and will not, due to professional confidentiality, be able to reveal to KCI any confidential financial information of any donors with whom Kardia consults or does Family Wealth Counseling.

E. However, if permitted to do so by the donor, Kardia will provide to KCI the names and actual dollar amount of each planned gift Kardia generates for KCI from referrals provided by them.

#### **IV. Services Provided by KCI**

A. KCI agrees to actively work to identify potential major planned giving donors and agrees to cover all expenses relating to that identifying and marketing process. These expenses include:

1. Printing costs of marketing and training materials
2. Both outgoing and incoming postage
3. Its own long-distance telephone costs
4. Sponsoring group private briefing dinners
5. All travel-related expenses incurred by Kardia for meetings with donors or KCI staff meetings

B. KCI agrees to make every effort to initiate and arrange a minimum of at least two introductory meetings between Kardia and their potential major donors annually.

This introduction will include:

1. Explanation of KCI's relationship with Kardia
2. Explanation of who Kardia is and how Kardia works
3. Explanation of why KCI wants the potential donor to meet with Kardia
4. The objective of KCI's efforts is to gain agreement from the donor to meet with Kardia for an initial introductory and exploratory meeting

This mutually binding Agreement between the aforementioned organizations is being entered into by the representatives of each organization as signed below.

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E. G. "Jay" Link  
President, Kardia, Inc.  
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John L. Smith  
President, Kingdom Causes International  
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Date