

Ministry Working Agreement
between
Kardia, Inc.
and
ABC Ministries

I. Purpose

Whereas ABC Ministries hereinafter referred to as ABC desires to provide advanced planned giving ministry services to its constituency and, whereas, Kardia, Inc., of Mooresville, IN (hereinafter referred to as Kardia) is desirous of providing said ministry services to the constituency of ABC, 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 ABC for any professional errors or omissions incurred by Kardia in its practice of Family Wealth Counseling.

Ministry Working Agreement

III. Services and Materials Provided by Kardia

- A. Kardia agrees to assist ABC 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 ABC 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 ABC 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 ABC promotional literature and mailing materials.
 6. To provide personal coaching for ABC Executive and Development staff as they work to open the doors to their major donors for meetings with Kardia.
 7. To make available complimentary copies of the book, *Family Wealth Counseling: Getting to the Heart of the Matter* and promotional DVD to ABC to use in its promotional efforts.

- B. Kardia agrees to donate its time for any and all of the above related activities including making personal trips to visit current or potential ABC donors. Kardia will cover all out-of-pocket travel expenses they incur for initial donor meetings. Expenses for any and all subsequent donor/family meetings will be negotiated between Kardia and the donor.
- C. Kardia cannot and will not, due to professional confidentiality, be able to reveal to ABC any confidential financial information of any donors with whom Kardia consults or provides Family Wealth Counseling services.
- D. However, if permitted to do so by the donor, Kardia will provide to ABC the names and actual dollar amount of each current or deferred planned gift Kardia generates for ABC from referrals provided by them.

IV. Services Provided by ABC

- A. ABC 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
- B. ABC 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 ABC’s relationship with Kardia
 - 2. Explanation of who Kardia is and how Kardia works
 - 3. Explanation of why ABC wants the potential donor to meet with Kardia
 - 4. The objective of ABC’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.

 E. G. “Jay” Link
 President
 Kardia, Inc.

 Name
 President
 ABC Ministries

_____, 2008
 Date