



Transfer Policy

Changing Chapters

Below are guidelines for members in good standing to follow when they wish to transfer their membership from one chapter to another. Reasons for transferring include relocating to another city; territory has been reassigned; changing jobs to a new classification that is filled in your current chapter; or your region has opened a new chapter which is more central to your work area. This process should be completed on a two to three week timetable.

Transferring Member's Responsibilities

- ❑ Visit the chapter into which you wish to transfer. Obtain a Transfer Request Form and a New Member Application.
- ❑ Notify your current chapter's Leadership Team and make them aware of your intent to transfer.
- ❑ Complete and submit the Transfer Request Form to the regional office by fax at 503-621-3274 or email at robin@bni.com. **You must receive the Executive Director's approval and signature prior to proceeding.**
- ❑ Complete a New Member Application and submit it to the new Membership Committee, **along with a minimum of one year's membership dues**, and a copy of the APPROVED Transfer Request Form. Annual membership fees are required for any member wishing to transfer with less than 12 months remaining on their membership. Your membership time remaining from the previous chapter will be added to your new one year membership.
- ❑ Provide the names and contact numbers of your previous Membership Committee and Vice President along with your application to your new chapter.
- ❑ Recommended: Replace yourself in the chapter from which you are transferring with either someone in your profession or in another profession.
- ❑ Upon acceptance, notify your former chapter's Leadership Team that you have been accepted into the new chapter. Include the date you will be transferring. Upon induction, you will **not** receive a new member packet.
- ❑ Attend the Member Success Program within 60 days of approval if it has been more than 6 months since you last attended.

Membership Committee Responsibilities

- ❑ Process the application of the transferring member as if they were a new member to BNI. Conduct the interview, one-to-one, business reference verification check, and research.
- ❑ Contact the transferring member's previous Membership Committee:
 - What is the attendance status of the transferring member?
 - Is the transferring member in good standing?
 - Are meeting fees paid and up-to-date for the transferring member?
 - Are BNI Membership Dues paid and up-to-date?
 - What is the transferring member's due date?
 - If the transferring member reapplied to be part of your chapter's marketing team, would you rehire them?
 - Note: If the previous Membership Committee is not available, please contact the BNI regional office.
- ❑ If the application is approved, have the Secretary/Treasurer submit the office copy of the transferring member's application along with their minimum of one year's membership dues to the BNI regional office. Mark the payment box with the words: Transfer from XXX Chapter/Approved by XXX Director.

If you have any questions, please contact your Director.

Robin Schuckmann, Executive Director
BNI Oregon & SW Washington
Phone: 503-621-3284, Fax: 503-621-3274
Email: robin@bni.com, Web: www.bnioregon.com



Transfer Request Form

Official Documentation Required

- A Member in good standing, requesting to transfer their membership to another chapter, must complete and submit this form for approval and signature of their Executive Director.
- Upon approval of this Transfer Request Form by the Executive Director, the member should then submit this completed form along with a completed New Member Application to the Vice President of the chapter they wish to transfer to.
- Along with the approved Transfer Request Form and the completed New Member Application, the member will be required to submit a minimum one-year membership fee to their new chapter if they have less than 12 months remaining on their current membership. Upon acceptance by the Membership Committee of the new chapter, the remaining months the member has left from their former chapter will be added.

Step One: Member's Request

Member Name: _____

Company Name: _____

Phone: _____ Fax: _____

Email: _____

Chapter Transferring **FROM**: _____ Last Date Attended: _____

Vice President Name: _____ Phone: _____

Request to Transfer **TO**: _____ Effective Date: _____

Reason for Transfer: _____

*Please fax this form to BNI Oregon & SW Washington at 503-621-3274 **PRIOR** to proceeding with transfer.*

Step Two: Executive Director Approval

Approved

Denied

Executive Director Signature: _____ Date: _____

Number of Months Remaining to Transfer: _____

(Will be officially determined when application is received in the regional office.)

Comments: _____
