

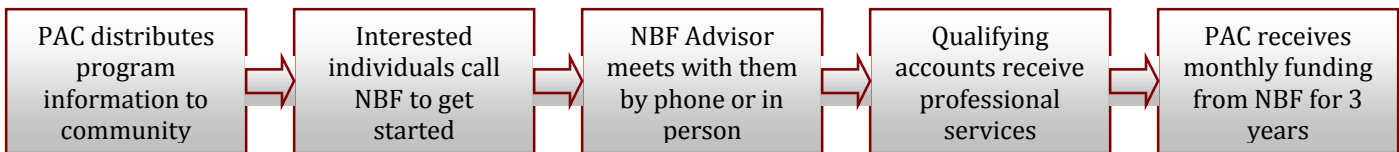
STREAMLINING FUNDRAISING FOR PARENT ADVISORY COMMITTEES

THE NATIONAL BANK REFERRAL PROGRAM



The National Bank Financial (NBF) Referral Program provides a way for PACs to raise funds by leveraging relationships within their community and connecting individuals in need of wealth management advice with a trusted advisor.

All your Parent Advisory Committee or Fundraising Committee needs to do in order to get started, is to provide information to parents or members of your community so they can contact us, and they will speak to and/or meet with an Advisor who will see if National Bank’s service offerings meet their individual needs.



RRSPs, RRIFs, TFSAs, RESPs, and investment accounts are all eligible for the program. Your PAC will receive quarterly payments for three years for household accounts over \$100,000 (combined household assets), or an up front one-time donation of \$150 for qualifying smaller accounts.

PAC fundraising example table by referrals per year				
Referrals per year	Year 1 funding	Year 2 funding	Year 3 funding	Year 4 funding
10	\$2,100	\$4,200	\$6,300	\$6,300
25	\$5,250	\$10,500	\$15,750	\$15,750
50	\$10,500	\$21,000	\$31,500	\$31,500
100	\$21,000	\$42,000	\$63,000	\$63,000

* Based on referrals of households with exactly \$100,000 in investable assets with 1% flat annual fees. Actual payments will vary due to account type, account activity, and products, NBF advisor and the client will choose the most appropriate account types and investment products based on the client’s individual needs.



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A STREAMLINED FUNDRAISING PROCESS: How to maximize results

Year 1 – Getting started

The PAC or school fundraising committee, after completing the appropriate documentation, will receive a kit containing print material to distribute using the method of their choice, whether for distribution to the entire student population or on a more targeted basis. The kit materials can be replenished at any time by simply phoning NBF.

Successfully qualifying referrals will start contributing funds to your PAC in the following quarter and these payments will continue for the following three years.

Years 2 & 3– Continuing the program

Leveraging on the first year's work by the PAC or fundraising committee, focus can be made specifically on new student intake, new kindergarten families entering an elementary school and students new to the school, for example. Continuing education about the program to the returning student population and families may increase participation as well.

Qualifying referrals from the previous year will still be contributing funds to your PAC for the following two years. New successful qualifying referrals will increase these contributions.

Years 4 and beyond – Mature program

Qualifying referrals from the first year will expire, and the contribution stream will begin to flatten out. If the PAC so chooses, they may wish to look at expanding their use of the program into the wider community, such as the school's neighbourhood, or to grandparents, aunts and uncles, in order to increase contributed revenue.

Optional financial educational seminars

Throughout the program, the PAC may wish to take advantage of our Investment Advisor's expertise to educate parents and students on the program and a variety of financial topics by conducting seminars at the school or in another location. Topics include:

- How to pay for your children's education using property taxes
- Commonly overlooked fixed income opportunities
- Tax and financial planning