

BANK NAME: _____
City, State, Zip: _____
YOUR NAME: _____
Your Official Title: _____
Street Address: _____
Mailing Address: _____
Primary Phone: _____
Secondary Phone: _____ Fax: _____
Email: _____
Bank Website: _____

***** PERMISSION REQUEST:** In an effort to best help our Industry Partners, we request your permission to share your club and travel information with our membership. Your signature at the bottom of this form is an authorization for us to share the information you provide. ***

1. CLUB NAME: _____
2. Are you the primary club director? Yes No*
* If no, please list the primary club director's name & location: _____
3. Are you reporting for your club alone or multiple clubs? one club multiple clubs
If applicable, list any other additional club contacts and titles:

4. How many branches does your club represent?

5. What year was your club formed? _____
6. What year did you become the club director? _____
7. How many members do you have today? _____

On average, please share your club's annual activity in the following travel categories:

- ◆ Day trips Average # _____ trips and # _____ travelers
- ◆ Motorcoach trips of 4 days/3 nights or less Average # _____ trips and # _____ travelers
- ◆ Motorcoach trips longer than 4 days/3 nights Average # _____ trips and # _____ travelers
- ◆ Trips that require flying in North America Average # _____ trips and # _____ travelers
- ◆ International trips Average # _____ trips and # _____ travelers

Please share with us some of the **special interests** your club enjoys (check all that apply):

- Cruises
- Casinos/Gaming
- Historical
- General sightseeing
- Spa / All-Inclusive
- Active (ie. biking, hiking, golfing & fishing)
- Shopping
- Agricultural
- Sporting Events
- Culinary
- Theater
- Women-Only
- Hands-on
- Wine Tasting
- Religious
- Other: _____

Do you offer trips specifically catered to Baby Boomers? Yes No

Over the next 3 years (2023, 2024, 2025) what major destinations do you hope to plan for club trips:

North America (United States, Mexico and Canada) - check all that apply:

- West Coast
- Southeastern US
- Alaska
- Canadian Rockies
- Other: _____
- Pacific Northwest
- New England
- Hawaii
- Maritime Canada
- Midwest
- Mid-Atlantic
- Mexico
- Eastern Canada (Ontario & Quebec)

International Destinations - check all that apply:

- Central America/Panama Canal
- Southeast Asia
- Western Europe
- Antarctica
- South America
- China
- Scandinavia
- Africa
- Japan
- Eastern Europe
- Middle East
- Australia/New Zealand & the South Pacific

Heritage Clubs appreciates your interest in becoming a Banker Member. Once your application and payment have been processed, we invite you log into the website www.HeritageClubs.com and check out the member-only resources that are available to you. If you have any questions, please contact Tina Goeske. We look forward to working with you and hope to meet you at Peer Group or one of our Fall Forum Training events.

Your Signature

Date

Completed application along with payment can be sent to: Heritage Clubs International, P.O. Box 363, Waupaca, WI 54981 or sent via email to Tina Goeske

Questions? Contact Tina Goeske, Associate Director | 952.835.6543 | tina@heritageclubs.com



TRAVEL REPORT (Travel Completed October 1, 2022-September 30, 2023)

Please report all travel from 10/1/22 through 9/30/23 below including tours with Preferred Tour Operators (PTOs) and other operators. As a member of HCI you may offset the Annual Fee of \$100 (starting next year) by reporting your tours during the previous year with any one of the PTOs that includes a **minimum of 15 paid travelers**. *Qualifying PTOs are: Allied Tour & Travel, Collette, CTN Travels, GoNext, Hospitality Tours, Mayflower Cruises and Tours, and Ozarks' Kirkwood Tour and Travel.*

Bank Name with City, State: _____

Completed by: _____ Date: _____

Extended Trips (National or International Tours – usually more than 5 days) :

Tour Company	Dates of Travel	# of Pax	Destination
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Regional Tours (usually 2 to 5 days) :

Tour Company	Dates of Travel	# of Pax	Destination
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Day Trips – Total Number: _____

Destinations/ Events (list Top 10 or continue on separate page):

_____, _____, _____

_____, _____, _____

_____, _____, _____

Heritage Clubs takes great pride in offering our Bank Club members **special services, products and partnerships** that benefit you, your club and your bank. We would like to know **who you have had the opportunity to work with over the past few years**. These partnerships include **Corporate Partners** along with the many **destinations (CVBs), attractions, vendors and suppliers** who support us.

Please list here any HCI industry partners that you have worked with (other than Preferred Tour Operators):

_____, _____, _____

_____, _____, _____

_____, _____, _____