

# PACIFIC INVESTORS

## Senior Partner Responsibilities Agreement

- 1) I will **commit a minimum of 3 and ½ hours per month**, 2 hours for attending the monthly partner's meeting, 1 to prepare and post my homework, and ½ to attend my Partner Team meetings.
- 2) I will **actively participate** in management and investment decisions, endeavor to present **at least one proposed new partner within three years of joining and strive to reach an account balance of \$250,000 within 15 years.**
- 3) I will **vote monthly**, by proxy, if necessary, on Pacific Investors' investment decisions.
- 4) I will **attend the Annual Partners Retreat in person and will attend the 22 retreat classes, meals, Roundtable Symposium, and the Annual Awards Banquet, and submit my evaluation.** I will take Thursday, Friday, and Monday of the retreat off work if need be, to attend the retreat.
- 5) I will **attend at least 80% of the monthly partner meetings, or 10 of our 12 monthly partner's meetings each year.**
- 6) If I am unable to attend a **monthly partner's meeting, 1<sup>st</sup> Saturday Workshop, or Annual Retreat (or portion of it)** I will **notify the Presiding Partner** by phone or email, **by the day before.**
- 7) I will prepare my monthly homework and post it to my folder on our bivio web site. I will **post it to our web site each month by 11 PM the Friday four days before our monthly partner's meeting, even if I am unable to attend the meeting. I will post them at least 80% of the months, or 10 of 12 months of each year.**
- 8) I will complete the requirements and parts of the **Club Education Curriculum** to become a **Certified Pacific Investor, CPI**, by the end of **my third year** as a partner in Pacific Investors.
- 9) I will self-deposit at least \$300 monthly into my partnership capital account unless I have a capital account balance of at least \$250,000.
- 10) I will maintain my high-speed internet service, e-mail access, and a computer and software capable of supporting my homework **and bivio.com.**
- 11) I will maintain my **CPI® CERTIFIED PACIFIC INVESTOR®** status while I am a partner.
- 12) I will accept, and support decisions passed by a majority vote, even if I voted against the motion.
- 13) I have read the Pacific Investors **Fact Sheet®** and **Partnership Agreement.**
- 14) I agree with Pacific Investors' **investment policy**, as stated in our partnership agreement.
- 15) I can handle stock market declines that result in a loss to Pacific Investors, and to me.
- 16) I will keep my address, phone, and e-mail addresses/numbers current with the Managing Partner, the Financial Partner, and the Trading Partner.
- 17) I will honor my commitments on my partnership application and in this document.
- 18) I will **not disclose to non-partners** information about other partners that I learn as a **partner, or investment information about strategies, tools, and investing education that I gain as a partner.**
- 19) **I will do my best** to get to know the other partners, become better educated, have some fun, **work in Pacific Investors' best interest, and learn how to make money with Broad-Based Index Options** while a partner.

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Partner's Name (Printed)

Partner's (Signature)

Date

06/18/23

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Significant other's Name (Printed)

Significant other's Signature

Date