

# WHO DO WE WANT TO INVITE TO JOIN?

## How to evaluate your social network to determine who to invite

### What Makes a Great New Partner for Pacific Investors?

At Pacific Investors, we care more about having **great people** in the group than having lots of people (Quality over Quantity). Every new person needs to bring something special to the team. Here's what we're looking for:

- **A Friend in the Group**

Every new member needs to be invited by someone already in the group who knows them and trusts them.

- **Excited to Learn (and Share) About Investing**

We're looking for people who are curious and eager to dive into how we invest and trade options in the stock market. Beyond learning, we value those who are excited to share their knowledge, helping others grow and contribute to the group's success.

- **Keeps Promises and Commitments**

It's important that new members do what they say they will and help out when needed. This includes all the items in the Partnership Application, Partnership Responsibilities Agreement as well as the Partnership Agreement.

- **Willing to Work Hard**

Every member has to do their homework, come up with ideas for investing, and share what they've learned with the group.

- **A Growth Mindset**

The market has its ups and downs, but that's part of the journey! We're looking for people who stay curious, learn from every experience, and keep improving to help themselves and the group grow stronger.

At Pacific Investors, we focus on trading (non-equity) index options. The group is structured such that we cannot benefit from an individual's invested account balance. Our only gain from adding additional partners is collaboration and brain power—it's about finding the right people to help everyone win. We love helping friends and family grow their wealth and knowledge, but it takes commitment, curiosity, and teamwork to fit in.

# **PACIFIC INVESTORS**

## **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 Education Conference in person and will attend the 22 retreat classes, the lunches, dinners, Roundtable Symposiums, and the Awards Banquet, and submit my evaluation.** I will take Thursday, Friday, Saturday, and Sunday of the Education Conference off work if need be, to attend the Education Conference.
- 5) I will **attend at least 80% of the monthly partner meetings, or 10 of our 12 monthly partner's meetings each year.**
- 6) I will **attend at least 2/3s of the 1st Saturday Workshops, or 2 of our 3 workshops each year.**
- 7) If I am unable to attend a **monthly partner's meeting, 1<sup>st</sup> Saturday Workshop, or Annual Education Conference (or portion of it)** I will **notify the Managing Partner** by phone or email, **by the day before.**
- 8) 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.**
- 9) 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.
- 10) I will self-deposit at least \$300 monthly, **on the 10<sup>th</sup> or 20<sup>th</sup> of the month**, into my PI partnership capital account unless I have a PI partnership capital account balance of over \$250,000.
- 11) I will maintain my high-speed internet service, e-mail access, and a computer and software capable of supporting my homework **and bivio.com.**
- 12) I will maintain my **CPI® CERTIFIED PACIFIC INVESTOR®** status while I am a partner.
- 13) I will accept, and support decisions passed by a majority vote, even if I voted against the motion.
- 14) I have read the Pacific Investors **Fact Sheet®** and **Partnership Agreement.**
- 15) I agree with Pacific Investors' **investment policy**, as stated in our partnership agreement.
- 16) I can handle stock market declines that result in a loss to Pacific Investors, and to me.
- 17) I will keep my address, phone, and e-mail addresses/numbers current with the Managing Partner, the Financial Partner, and the Trading Partner.
- 18) I will honor my commitments on my partnership application and in this document.
- 19) 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.**
- 20) 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 Non-Equity Broad-Based Index Options** while a partner.

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Partner's Name (Printed)

Partner's (Signature)

Date

02/17/25

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Significant other's Name (Printed)

Significant other's Signature

Date