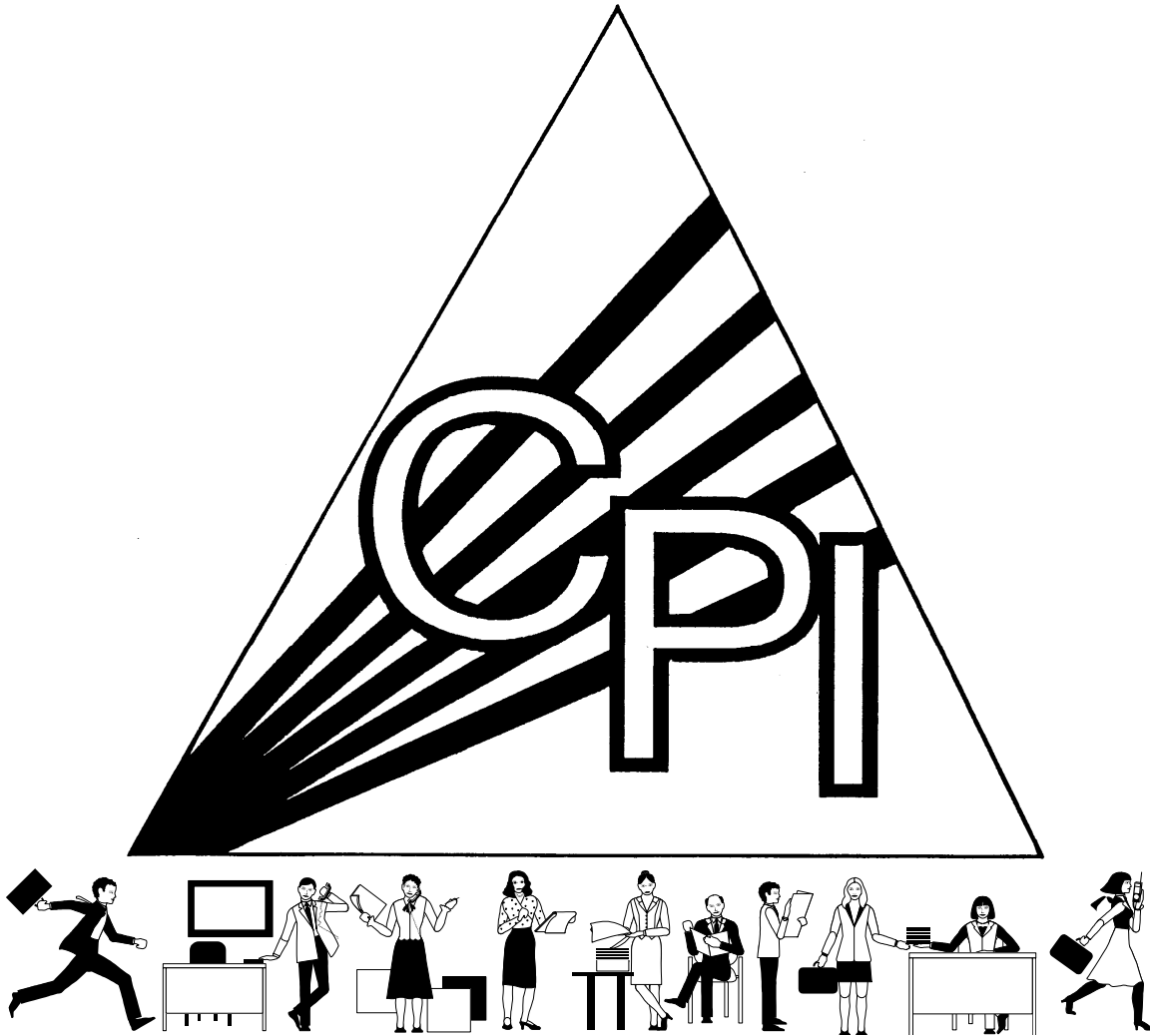


EXTENSION KIT

CREDIT PROFESSIONALS INTERNATIONAL



EXTENSION KIT
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Revised: May 2009

EXTENSION KIT

TO THE ORGANIZER:

This kit contains the information and the materials you need to organize your new local association.

Start by reading through the pages on "HOW TO ORGANIZE" (starts on page 5).

Listed below are the Items for the kit. To order free copies of CPI publications and the Membership brochure to use for extension purposes, see order form on page 25.

Item and use	Office	Website	Cost
For initial organization			
♦How to organize (starts on page three)			
♦Bylaws		X	
♦Sample bylaws – use as guide for your local association. Includes membership requirements.		X	
♦CPI International – for your information		X	
♦CPI Standing Rules – for your information		X	
♦History and Purpose of CPI		X	
♦Questions Frequently Asked (about CPI)		X	
♦CPI Pledge (agreement to uphold CPI bylaws)		X	
♦IRS Application for non-profit status. Get download instructions on CPI website. Apply online. When you get tax ID number, give to CPI, which will file a required e-postcard tax form for you each year. (You will not have to pay taxes unless you have a profit of more than \$25,000 in any one year.)	<i>Apply upon completion of organization</i>		

Item and use	Office	Website	Cost
Publications			
♦Education Manual – contains articles about credit, finance, personal and professional development. One is sent each year to each paid member.	You get 3 free, upon request		\$3.00 additional copies
♦Newsletter: <i>The Credit Connection</i> . Published quarterly. All members get free through an e-mailed link to the CPI website. Those without internet access can request a free copy by mail.		X	
♦Magazine: <i>The Credit Professional</i> . . Published annually and sent to each member.	You get 3 free, upon request		\$5.00/member additional copies \$10.00 for non-members
♦CPI Handbook: Excellent guide to many details about CPI: awards programs, etc.		X	
♦CPI Jewelry Catalog. Lists all jewelry available with information on how to order and obtain prices, which are actual cost from supplier and vary based on current price of gold.		X	Free hard copy to those without internet access

Item and use	Office	Website	Cost
Items related to membership			
<i>GENERAL</i>			
♦Membership brochure: for prospective members. Gives overview of CPI: purpose, benefits and services.	You get 25 free, upon request	X	
<input type="checkbox"/> Membership Dues Report Form: List name of each paying member with date and amount paid.		X	
♦Officer’s Roster (entitled “Change of Officer Form”) used to report names, addresses, etc. of current officers.		X	
<i>FOR INDIVIDUAL MEMBERS</i>			
You’ll need one of each of the following items for each member.	1 of each form listed		
♦Personal Data Form: information needed for membership data base – name, company, address, etc.		X	
♦Committee Preference Form		X	
♦Certification Form: Information about the certification program and application form.		X	

Also available is a "New President's Kit" which we will send--either to you to give to the new President when the local association is organized, or directly to the President as soon as we get the name and address. The choice is yours.

HOW TO ORGANIZE A NEW CPI LOCAL ASSOCIATION

Every phase of organizing a new CPI local association calls for salesmanship. Two of the most important characteristics of a successful salesman are conviction and enthusiasm. Knowledge of the product is important, too. This and other sales techniques can be learned. Keep using these phrases: "Membership Makes the Difference" and "Credit Professionals Makes the Difference."

Notify Your District

Contact your District President, who will be happy to assist you. Keep the district and the corporate office informed about your plans and progress with the new local association. They may be able to give you information about other efforts in that area and whether or not there are any leads, such as an inquiry about membership in CPI.

Using Local Resources

Talk with the managers of the credit bureaus that cover the area you are planning to organize. Bureau personnel can be very helpful with contacts as they are familiar with the companies in the area that are involved in credit.

Another good source of support and referrals is the local Chamber of Commerce. The business people who make up the Chamber have a vital interest in the integrity of credit practices in their community.

You can include both the Chamber and Credit Bureau(s) in your plans. In fact, the personnel of the bureau are eligible for membership in CPI, as are many of the Chamber members.

In some areas there may be one or more companies interested in CPI. You can involve them in the same ways suggested for bureaus and chambers. Certainly they can help with contacts and referrals.

Tell them about the cooperation of CPI:

Credit Professionals International cooperates at all levels with the Consumer Education Programs being sponsored by CCCS and ACB, such as debt counseling, credit education courses in schools, appearances before high school and college classes, and various community groups.

Let them know that you are ready to help with programs of this kind, or that you are willing to cooperate in establishing this kind of community program .

Stress that CPI is an educational and business association. Display the latest issue of *The Credit Connection*, the current *Education Manual*, and the magazine, *The Credit Professional*. Let them know there are educational opportunities at the local, (state, if applicable), District and International Conferences.

Ways to use Local Resources:

- They can publish information in their newsletters and bulletins about Credit Professionals International and about the organization of the new local association.
- They could do one or both of the following:
 - Mail letters to prospective members
 - Enclose a card with their newsletter about the organizational meeting

Prospective Members

Too much emphasis cannot be placed on the importance of getting qualified members. Our organization's activities center around education for the person who is involved in handling credit and/or financial transactions.

If members are not interested in what the local association does at its meetings, one of two things will happen: they will stop coming, or they may try to get the group to do something besides have credit education programs at meetings. When a local association no longer spends its time on credit education, it frequently loses the support of the major credit grantors.

You are probably working on organizing a local CPI because one or more people expressed an interest in the organization. When you are making your list of prospects, be sure to include the bureau staff and member companies of the Chamber of Commerce.

Ask them to compile a list of names of people and companies, addresses and telephone numbers of others who are eligible for membership. You can coordinate this list with the information received from the local resources mentioned above. (It is important to have names as well as companies to be sure your communication is getting to the appropriate person.)

This organization kit includes sample letters to send to prospective members and employers. You can also obtain 25 free membership brochures which give information about CPI. You can also download the brochure from the CPI website and print your own copies.

Making Those Contacts

LETTER PHONE PERSONAL VISIT FAX EMAIL

(And some will learn of CPI through word of mouth.)

Now is the time to start contacting every name on the list. Part of how you do this depends on your method of operation. Some people prefer to send a letter first, followed by a phone call. Some are more comfortable using the telephone to make that first contact and follow up with a letter and brochure. Still others may prefer the face-to-face contact of a personal call. They can give the brochure during the course of the visit.

That initial contact is very important. The purpose is to get acquainted with CPI, to let them know about the advantages and benefits of membership. Focus on education, contacts and networking. Let them know where you are in the organizational stage. If you know, give them the date/time/place of the meeting. If this has not yet been established, tell them you'll be in touch later with details of the organizational meeting.

As you talk with your prospects, you may be making notes about which persons might have the background, experience and personality to be the officers. Attempt to learn some of these facts through your conversations:

- Do they belong to any other organizations?
- Ever been president?
- Held any other office?
- Friendly?
- Outgoing?
- Make a good appearance?

Advantages/Benefits of Membership:

One of the most effective sales techniques is to relate your own positive experience as a member of Credit Professionals. Below is a list of advantages and benefits common to members, and to their companies, which you can use when making your contacts:

Contacts and Networking

- Members come from all occupations and backgrounds, making Credit Professionals International one of the most valuable networks in the industry.
- Increases the firm's visibility
- Good public relations through positive contact with other businesses
- Opportunities for nation-wide friendships among members through attendance at conferences

Continuing education through

- Local Programs
- Outstanding Speakers
- Seminars and Conferences at the local, state, district and international level.
- Updates on legislation and other credit issues
- Professional publications—*The Credit Professional*, *The Credit Connection* and the *CPI Education Manual*

Personal and Professional Development

- Enhancement of leadership skills
- Opportunities for self-improvement
- Professional Certification through CPI
- Information Link
- Promotes professional integrity and business ethics.
- Promotes a sound community credit atmosphere

Membership Marketing

In this organizational kit you will find sample news releases and letters to use for marketing purposes.

You can order 25 free copies of the CPI membership brochure with information about CPI or download it from the CPI website and print your own copies. There is a place on the brochure to put the name, address and phone number of a local contact.

Show prospective members the latest issues of *The Credit Connection*, the current *Education Manual*, and magazine, *The Credit Professional*

About the Cost:

Sometimes this is one of the first questions asked by a prospective member. Certainly it is important for them to know what they will get for their money. You can assure them that the cost of being a CPI member is very low in comparison to most professional organizations.

You may not be able to give them an exact cost at first since the total amount of the dues will be determined by the local association. In addition to international dues there are district dues, in some areas there are state dues, and then the final figure is the amount of local dues you estimate it will take to finance your programs and activities. Your District president can assist you in setting local dues and tell you what the district and, if applicable, state dues are. International dues are \$80.00 per member. There is a discount for employers who pay CPI International dues for their members. They pay \$80.00 each for the first two members and then \$65 each for additional members.

Other things to consider:

- If your meeting is in conjunction with a meal, the prospective member will also need to know the approximate cost of the meals
- In some local associations the dues for most members, and often the meal expense as well, is paid for by their companies. Sometimes the employer will pay dues, but not for meals
- Many members pay their own dues and expenses

PLANNING THE ORGANIZATIONAL MEETING

After you have talked with the local resources and feel there is sufficient interest in a local association to proceed, discuss with them the best time and place for the meeting. Once they get home, many people are reluctant to go out again to a meeting. If you decide on a dinner meeting, choose the best place in town unless the prices are really exorbitant. This adds to the importance and prestige of the local association and its standing in the community. Some local associations find that breakfast meetings work well.

Setting up the meeting:

1. Choose the time and place.
2. Publicize it in every way you can:
 - a newspaper article
 - recognition in other media venues
 - a feature in the bureau and chamber bulletins
 - letters to all prospects with reservation cards enclosed which are to be mailed back
3. About a week before the meeting, make follow-up phone calls to those important prospects who haven't sent back the card.

Plan the meeting:

1. Arrange for several people to meet the guests at the door.
2. Arrange to have a record of names and firms of those attending (assign someone to pass a pad for them to sign, and collect pad at end of meeting, have attendance cards at each place, etc.).
3. If it's a dinner meeting, know ahead of time the arrangements for payment: Do you collect at the door? If so, be on hand early with tickets (if required) and change.
4. Assign several people on your organizing team topics on which they are to make five minute talks, then answer questions. For example:
 - a. The purpose of the local association: educational programs, manuals studied;
 - b. Affiliation with District, State and International organizations;
 - c. Community contacts;
 - d. Personal "dividends" (new friends, self-improvement); costs may be paid by employer; number of meetings; types of programs and speakers, etc.

- You will want to include those who are your local resources in this activity. Give each of them the opportunity to state their support for CPI, how it will benefit the community, enhance the credit industry, etc.
 - Make these assignments well in advance so the speakers can have time to plan what they are going to say, **and** so they can keep it short and present only solid information.
5. Decide what you wish to accomplish at this first meeting. You can:
- a. vote to organize, nominate and elect officers and set the date for the Installation and Charter dinner, --- or --
 - b. you can vote to organize, and appoint a nominating committee to report at the next meeting to be held within two weeks

Most organizers feel it is unwise to elect officers at the first meeting unless you are very well acquainted with the group, know who will be successful leaders, have discussed the matter with them and they have agreed to serve. The first year officers are often the deciding factor as to whether a local association will succeed, and they should be carefully chosen.

No matter which of these plans you follow, before the first meeting is held, you should make arrangements for the next one. Have a date and a speaker arranged for this meeting. The election of officers and the approval of the few items in the bylaws will only take a few minutes. These members joined because they want to learn, and if the first few meetings are spent with business only, you will lose the enthusiastic momentum that you need.

Select a speaker who will be considered an expert to talk about a topic of interest to everyone. For example, an FBI speaker talking about "Credit Card Thefts," the local police chief discussing "Bad Check Losses," a local attorney on "Bankruptcy--Whose Fault?," or someone well-informed presenting recent legislation affecting the credit field.

6. Plan your agenda. Write it down, estimating the amount of time you think each item should take. The meeting itself--not including the time spent serving and eating dinner--should not last more than one hour.

THE ORGANIZATIONAL MEETING

1. Call to order by one of the organizers or by one of the local resources who has been particularly supportive.
2. Introduction of one of the organizing group to act as chairman.
3. Introduction of those seated at the head table and out-of-town guests.
4. Self-introductions, giving the name of employee and firm.

5. Remarks from the Chairman. The purpose of the meeting is to give them more information about CPI so they can decide whether they would like to have a local association and if they would like to join. Introduce the people who are prepared to talk about the various phases of local association activities.
 6. Ask for questions from the audience and have the panel of speakers answer them. (Don't let this drag! You may want to limit this part to about 10 minutes.)
 - Be prepared with some questions of your own if needed to keep things moving.
 - As soon as the questions begin to slow down, if you feel all the important points have been presented, close this portion of the meeting.
 7. Call for a motion to organize.
 8. If they vote to organize, outline the procedure that will be followed:
 - a. A nominating committee of 3 people will be appointed to bring in a slate of officers to be voted on at the next meeting
 - b. A bylaws committee of 3 will be appointed to bring in suggestions for the meeting date and time, the amount of dues and other information to complete the beginning bylaws. (You should know before the meeting whom you are going to appoint to those committees. Be careful not to choose the people you hope will be the officers!)
 - c. Announce that your committee will meet with these two appointed groups after the meeting to give them the material they will need.
- If you feel it would be wise to let the group elect a temporary chairman and secretary after they have decided to organize, this can be done. The temporary chairman should appoint a bylaws committee and nominating committee and handle the balance of the meeting.*
9. Announce the next meeting:
 - Date, place, time and price of meal if it's that kind of meeting
 - Talk briefly about the topic and the speaker.
 10. Ask if there is any other business to come before the meeting, then close it promptly. If you have promised to have the meeting over by a definite time, be sure you do it. Then those who want to stay and visit may do so, but people who have other commitments are free to leave. Thank them for coming, etc.

After Adjournment: You will need two copies of sample bylaws, which you can download at the CPI website: www.creditprofessionals.org. Give one to the chairman of the nominating committee, and one to the chairman of the bylaws committee.

Nominating Committee: Point out Articles V--Officers, VI--Duties of Officers, and VII--Executive Board. These articles list the minimum number of officer to be elected, and Article V explains the way for a new local association to elect their first board members if they decide to have three on a rotating basis in addition to the elected officers.

Bylaws Committee: The information needed is in the sample bylaws. They are a guide to be used in developing local association bylaws. The individual items on which the local association must decide should be presented by the committee for vote at the next meeting. After these decisions are made, the bylaws committee should prepare enough copies of the accepted bylaws so each member may have a copy and a copy may be sent to the district president for approval and forwarding to the corporate office. There should be additional copies for new members. (The heading should indicate the date they were adopted.) A permanent copy should be placed in the files of the president and the secretary.

THE SECOND MEETING

Prepare for the next meeting as carefully as you did the first one. The chairman is responsible for making up the agenda.

- If one of the local members was elected chairman, help them make up the agenda. If a temporary secretary was elected at the first meeting, be sure he/she has a copy of the agenda ahead of time.
- Provide them with a brief report of the previous meeting: date, time and place, who called the meeting to order, name of chairman, number attending, people speaking and their topics, the fact that they voted to organize, and names of committees appointed.
- If no secretary was elected, appoint someone as temporary secretary before the second meeting, give him/her the agenda and the report of the first meeting and ask them to be prepared to take the minutes of this meeting.
- Every effort should be made to get more prospective members for the second meeting than you had for the first. You will have a list of prospects that was furnished to you by the Bureau Manager and/or Chamber of Commerce. Check off those people who attended, asking if they know any of those who did not come. Usually this will bring out some volunteers to make calls. The more of these calls you can assign to the local people, the better. A good many calls will need to be made.

COMPLETE THE ORGANIZATIONAL PHASE

This cannot always be done in two meetings. It may take three or four meetings before you get enough members signed up, your officers in place, etc. For these subsequent meetings, continue to have a strong program each time. After the speaker you can take care of the business related to organizing.

You will need to:

- Hold the election of officers and vote on bylaws
- If more than one candidate for each office is being proposed by the nominating committee, a printed ballot should be prepared before the meeting
- Establish a regular meeting place and time
- Help the education chairman plan the programs for several months in advance
- Be sure the chairman of the meeting understands how to conduct the election and other business of the meeting

The Installation and Charter Meeting:

Usually the organizing local association assumes the responsibility for planning this dinner, working closely with the new officers about arrangements.

You'll want to include all those who have helped get the organization started. Usually the new members involved also invite family members and co-workers to attend this function. Others you may want to invite:

- Nearby District and International CPI Officers
- Other CPI local associations in area
- Representatives of other local groups: American Business Women, Business and Professional Women, etc..
- President and/or Secretary of the Chamber of Commerce.
- Manager(s) and other bureau representatives
- Mayor or City Manager
- Representatives of related service or civic groups from the community.
- Small business owners

THE CHARTER

Before the local association can be issued a Charter, these four (4) things must be done:

1. The bylaws must be approved by the District President and the CPI corporate office in St. Louis.
2. The "Pledge" must be signed and sent to the corporate office.
3. A Membership Dues Report Form and a check covering the dues must be sent to the corporate office. (Form is in this kit.)
4. A "Report of New Officers" form (included in this kit) must be completed and sent to the corporate office and to the district.
5. Complete the IRS Application for non-profit status

When these things are approved and on file, the Charter will be mailed to either the new local association President, or to a member of the organizing local association for presentation. At this time, a package of materials including a handbook and an officer's manual is sent to the president of the new local association.

As organizer of this new local association, you will want to help the new officers get these first responsibilities taken care of promptly. The list of necessary forms are on pages 3-4.

SAMPLE AGENDA FOR ORGANIZATION MEETING

Introduction of Chairman of the evening	
Call to Order	Chairman
Introduction of each individual--be sure firm name is given. <i>(Can ask each person to introduce themselves giving name, company and job title)</i>	Chairman
CPI Information <i>(see #1 below)</i>	Chairman or other CPI member
Questions	Chairman or panel of CPI members
Does the group wish to organize <i>(see #2 below)</i>	Chairman
Call for Vote	Chairman
Election of Officers	Chairman
Appointment of Bylaws Committee <i>(See #3 below)</i> .	President
Appointment of next meeting: date, place, program <i>(See #4 below)</i> .	President
Thank attendees and adjourn .	President

NOTES ON AGENDA

Although not on agenda, you need to arrange for a form to be sent around, asking each person to enter their name, address, phone number, company name and phone number. Arrange for forms to be collected at end of meeting.

- (1) This information should include the principles and objectives of CPI. Materials which will be available to the new local association officers should be shown and discussed. Some comments should be made about the District, and about International and the benefits of affiliating with a continent-wide organization more than 75 years old, etc.
- (2) Following the questions and discussion, the group should be asked if it wishes to organize at this time. There may be some hesitation because of lack of information, so you may explain that they have these two choices:
 - They can organize now by electing a President, Vice President, Secretary and Treasurer.
 - They can elect a temporary Chairman and Secretary, who would be responsible for appointing a bylaws committee and a nominating committee who could bring suggestions for officers to the next meeting.

- (3) When the bylaws chairman or committee is appointed, give them copies of the Sample bylaws. If they want to use them as they are, they can fill in the blanks with the name, city and state of the local association, meeting dates and the amount of the dues.
- (4) The second meeting should have been decided upon before the first meeting is called. The time, place and program should be announced. The program is important. Although the business will include adoption of bylaws, and possibly the election of officers, this should not take up too much time.

The most vital thing is to schedule, no matter how briefly, something that will show what future meetings will be like. If the first meeting is taken up with organizational explanation and the election, and the second meeting contains nothing but the adoption of bylaws and other technical matters, some of the early interest, sparked by the promise of solutions to credit problems, will be lost. The program--education--is of prime importance.

A discussion of "How to Chase Skips," "Cashing Bad Checks," or any credit problem the community may have, presented by the Bureau Manager, a Police Officer, FBI agent or other qualified person, will gain interest and make the prospective members eager to come back.

ALTERNATE ORGANIZING MEETING

If the group indicates it would prefer to think it over and to later elect a chairman and a secretary, then the procedure is a little more simple, and we think, more desirable, unless there seems a clear-out choice of capable officers. Since the first year is such an important one, every care should be taken in the choice of the first President.

The chairman of the meeting may suggest a person to be elected temporary chairman. Usually, this person will go on to be President, so he or she should be carefully selected. The temporary chairman, when elected, should appoint a bylaws committee and a nominating committee, both of which should be instructed to report at the next meeting.

After appointment of these committees, the temporary chairman should announce the date, time, place and program for the next meeting (as above). Emphasis should be placed on the fact that, though the election and bylaws will take up some of the time, there will be a program.

If the meeting has been scheduled to last a definite time, make sure it is adjourned by that time so people who have other commitments can keep them. People who have more questions or who want to talk may stay for informal discussions. Nothing kills the effectiveness of a meeting so much as letting it drag on without normal adjournments until finally everyone gets up and leaves.

PUBLICITY

Pages 15-19 in this kit contain the suggested wording of news releases for the local media, news, radio and television.

IT IS IMPORTANT NOT TO USE THE PREPRINTED SAMPLE NEWS RELEASE “AS IS.” THIS IS A SAMPLE WHICH YOU CAN USE AS A GUIDE TO PREPARE THE ACTUAL NEWS RELEASE. MOST MEDIA TODAY PREFER TO RECEIVE NEWS RELEASE VIA E-MAIL. IF YOU MAIL A NEWS RELEASE TO THE MEDIA, IT NEEDS TO BE DOUBLE SPACED.

Ask the bureau and chamber to publish a report of the meeting, and include the announcement about the next meeting.

If possible, a letter telling about the next meeting and a reservation card should be sent to the prospects on the original list.

NEWS RELEASE.....(*for first meeting*)

From: CREDIT PROFESSIONALS INTERNATIONAL

Corporate Office
10726 Manchester Road, Ste. 210
St. Louis, MO 63122
Phone: 314/821-9393
FAX: 314/821-7171

Email: creditpro@creditprofessionals.org
Website: www.creditprofessionals.org

DATE: _____

Local Contact: _____ Phone: _____

Address: _____

For Immediate Release.....

NEW LOCAL ASSOCIATION PROPOSED

_____, President of Credit Professionals of _____

announces plans to organize a local CPI association in _____

The purpose of Credit Professionals International is to enhance career development, widen horizons in credit education and create innovative leadership for members in all cross sections of the industry. It also serves to develop closer contact among creditors, persons and firms

Membership in the new organization will be extended to those employed by companies engaged in any phase of the credit and/or finance industry.

A meeting to plan the organization will be held (time, place date). An invitation is extended to all prospective members. (If a meal is involved, if reservations are needed, or if you want more information), the person to call is

For further details contact : _____

At: _____

NEWS RELEASE.....(for second meeting)

From: CREDIT PROFESSIONALS INTERNATIONAL

Corporate Office
10726 Manchester Road, Suite 210
St. Louis, MO 63122
Phone: 314/821-9393
FAX: 314/821-7171

Email: creditpro@creditprofessionals.org
Website: www.creditprofessionals.org

DATE: _____

Local Contact: _____ Phone: _____

Address: _____

For Immediate Release.....

(replace items in (--) with the actual information about your meeting)

(John K. Harris, local FBI agent for the last ten years) will discuss (Credit Card Fraud) at the meeting of the new local association, CPI of (town) to be held at:

- Date
- Place
- Time

Following (Agent Haris') presentation, the group will elect officers and adopt the bylaws. (Name of chairman and firm) is Chairman of a committee to present nominees for the new officers. (Name of chairman and firm) is Chairman of the bylaws committee.

(Name) president of the local CPI sponsoring the new association will act as temporary chairman. (Name) explained that the purpose of the new organization is to provide education for those who work in the credit and finance industries. CPI is active in community credit education programs at all level.

A cordial invitation is extended (name) said today, to all prospective members who have not already joined the group. Any interested firms who would like to hear (FBI Agent Harris) are invited to attend. Reservations must be made by (date).

For further details contact : _____

At: _____

NEWS RELEASE..... (election of officers)

From: CREDIT PROFESSIONALS INTERNATIONAL Corporate Office
10726 Manchester Road, Ste. 210
St. Louis, MO 63122
Phone: 314/821-9393
FAX: 314/821-7171
Email: creditpro@creditprofessionals.org
Website: www.creditprofessionals.org

DATE: _____

Local Contact: _____ Phone: _____

Address: _____

For Immediate Release.....

PRESIDENT OF NEW LOCAL CPI ASSOCIATION

(Name of elected President) from (name of firm) was elected President of the newly formed local association of Credit Professionals International at the meeting held (place, date).

Other officers chosen were:

- Vice President: (name and name of firm)
- Secretary: (name and firm)
- Treasurer: (name and firm)

Speaking at the meeting was (FBI Agent Harris) who told the group of (number) of people interested in credit about (subject of speech).

Other business concluded at this meeting was the acceptance of the bylaws, affiliating the local group with the (name of district) and the international organization of Credit Professionals International.

The group agreed upon the amount of annual dues and set dates for future meetings.

(President's name) announced the next meeting will be the charter meeting, including installation of officers This meeting will be held (Date, Place, Time). Invitations will be extended, said (President's name), to members of other local civic and business organizations. Reservations may be made by calling the name and number below.

For further details contact : _____

At: _____

NEWS RELEASE..... **(Installation/charter meeting)**

From: CREDIT PROFESSIONALS INTERNATIONAL Corporate Office
10726 Manchester Road, Suite 210
St. Louis, MO 63122
Phone: 314/821-9393
FAX: 314/821-7171
Email: creditpro@creditprofessionals.org
Website: www.creditprofessionals.org

DATE: _____

Local Contact: _____ Phone: _____

Address: _____

For Immediate Release.....

NEW OFFICERS INSTALLED CHARTER PRESENTED

The newly organized local association of Credit Professionals International of (name of location) installed their charter officers, and were presented with their International Charter at a meeting held at (date, place, time). The Installing Officer was (Name of office and where from). Presenting the Charter was (Name of officer and where from). The local CPI association, having been presented their charter, now becomes a part of the International organization which maintains a corporate office and staff in St. Louis, MO.

(If possible list some of the major firms represented at the meeting)

The officers of the (name of new CPI local) are:

- President: (name and firm)
- Vice President (name and firm)
- Secretary (name and firm)
- Treasurer (name and firm)

The purpose of the organization is to provide credit education for its members and to maintain closer contacts among credit personnel in the community. The members are active in community credit education programs.

Membership is extended to those persons working for firms involved in any faced of the credit and/or finance industry. Interested firms and individuals may get information by contacting the person listed below.

The President, (name), announced the next meeting will be (place, date, time). The presenter will be

(name, firm). The topic for discussion will be (state topic).

For further information contact _____

Dear CPI Guest:

Having recently attended your first CPI meeting, we at CPI would like to extend our thanks and appreciation for showing an interest in Credit Professionals International. We enjoyed having you as part of our professional group, and hope that you will seriously consider becoming part of our regular gatherings, so that you too might access CPI's "Database of Information."

We hope you enjoyed this month's guest speaker. Through CPI you will have the privilege of listening and learning from informed speakers on a regular basis as well as gather up-to-the-minute data on industry relations and legislation, and much more.

Enclosed you will find a membership application. As part of CPI's highly competitive membership package, you'll have access to educational programs, guest speakers, a new professional networking group, and numerous personal and professional development tools. CPI offers all this at affordable yearly dues.

As human beings, every now and then we run a little low on steam. Maybe we need something new to motivate us, maybe we just need access to new information, maybe we need to get out and meet new people and make new connections, or maybe we need to perfect some of our skills to help us achieve our next goal. No matter what the reason, CPI can help you achieve your goals. Don't procrastinate, make the decision today to do something important for your future. Join CPI and get programmed for success.




If you have any questions, please don't hesitate to call me. I look forward to seeing you at our next meeting.

Sincerely,

Dear Credit Professional:

The _____ Association of Credit Professionals International is pleased to invite you, your employees and your co-workers to our next meeting on _____ at _____ p.m. Each monthly meeting includes dinner and a guest speaker who will share with us his or her expertise on credit and business-related topics.

CPI invites you to explore your future and get programmed for success! With the assistance of CPI you'll be able to meet your career demands by keeping abreast of market changes. Meet experts in the credit profession who can share their years of knowledge so that you can stay a step ahead of the competition. CPI has a fully developed program to further you in all areas of personal and professional development. If your old plan has run its course, try CPI's platform for success. We think you'll like the results!

 *Continuing Education*  *Seminars*  *Networking Opportunities*

 *Leadership Training*  *Guest Speakers*  *Professional Publications*

Now is the time to gain control over your competition. CPI can help you attain your goals through a more focused, directed path. Through years of experience, CPI has come to know the right combination of education and developmental training, making it a professional group that truly helps its members grow and excel to their fullest potential.

Enclosed is a flyer outlining upcoming CPI events and a brochure describing our member benefits. I will be calling you to extend a personal invitation to our next meeting, but in the meantime if you have any questions, please don't hesitate to call me at _____.

Sincerely,

Dear Credit Industry Employer:

As an employer in the credit industry, you have no doubt been faced with finding quality employee support and training programs at cost-efficient prices. This is where Credit Professionals International can help. CPI is a cost-efficient professional group that offers quality educational programs along with personal and professional development.

As a credit industry employer, you already know how informed, well-educated employees truly have a positive impact on your business. If you thought you had to go searching further than your own back yard to find this type of all-encompassing educational platform, think again. CPI is right in your own community. "What about cost?" you ask. Let me assure you our membership dues are nominal, and our seminars affordable.

CPI benefits both the employer and the employee. By aiding in the growth of your employees, you not only receive the benefits of a knowledgeable, well-rounded individual that can now contribute more to his or her job, but you are also providing visibility for your credit industry establishment.

CPI can help your employees "Get Programmed For Success." They'll learn about professional integrity and business ethics, receive up-to-the-minute information on regulations and legislation, and much more.

Enclosed is a flyer detailing our upcoming events, and a brochure outlining member benefits. I will be calling you to extend a personal invitation to our next meeting. In the meantime, if you have any questions, please don't hesitate to call me at _____.

I hope that you will join with other credit industry employers to utilize this valuable resource.

Sincerely,

EXTENSION KIT ORDER FORM

Use this form to order published materials that are part of the Extension Kit. These materials will be sent to you in the quantities indicated at no charge. If you need additional copies, please see pages two and three of the Extension Kit for pricing information.

Please send the following materials, to be used for the purpose of recruiting members for our new local association, to:

NAME _____
COMPANY _____
ADDRESS _____
CITY _____ STATE _____ ZIP _____
PHONE _____
E-MAIL _____

____ Credit Professionals International Education Manual (3 copies)
____ *The Credit Professional Magazine* (3 copies)
____ Membership Brochure (25 copies)

SEND THIS FORM TO:
Credit Professionals International
10726 Manchester Road, Suite 210
St. Louis MO 63122

OR FAX TO: 314-821-7171

If you have any questions, call the CPI Corporate Office at 314-821-9393