



# POLICIES SYSTEMS AND PROCEDURES 101

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

## PAYMENT

- Convenient ONE-PAY Option: \$3,995 \_\_\_\_\_
- THREE-PAY Option: \$1,464 Today, \$1,464 in 30 days, and \$1,464 in 60 days \_\_\_\_\_  
(all payments will be processed no later than 14 days prior to event)
- I authorize How To MANAGE a Small Law Firm to charge the amount(s) indicated above to my credit card on file and waive my right of chargeback. \_\_\_\_\_ (please initial)
- Please use the Credit Card Authorization completed today.

## BILLING INFORMATION

Card Type:  Visa  MasterCard  American Express  Discover  
Card Number: \_\_\_\_\_ CVV#: \_\_\_\_\_ Expiry Date: \_\_\_\_\_  
Name as it appears on the card: \_\_\_\_\_  
Card Holder's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## WORKSHOP AGREEMENT TERMS & CONDITIONS

Because our workshops are based on both minimum and maximum attendance numbers to ensure the best quality experience for all participants, we have instituted the following Cancellation and Transfer Policies.

I agree to continue to be bound by the terms of the "Master Member Agreement" that I have previously executed, and which is incorporated by reference herein. \_\_\_\_\_ (please initial)

If I have chosen the THREE-PAY Option, and either charge is declined, a 10% late fee may be applied. If I default on my obligations, I agree the full amount remaining due under this contract shall be payable in full and may be charged to my credit card.

## CANCELLATION POLICY

How To Manage A Small Law Firm (HTM) reserves the right to change dates and locations and/or cancel workshop dates based on low enrolment or other circumstances which would make the event non-viable. If HTM cancels or changes an event date, registrants will be eligible for a full refund within 7 days of notification of cancellation, after that standard transfer and cancel deadlines apply. Requests for Cancellations must be received in writing via email to support@howtomanageasmalllawfirm.com by the deadlines outlined below.

**0-7 days from Workshop Purchase** | Registrants may cancel their registration and request a full refund within 7 days of purchasing a workshop.

**30+ days prior to scheduled Workshop Start Date** | Registrants may cancel their registration up to 30 days prior to the scheduled workshop start date and obtain a credit on file. Credit on file may be applied to any future workshop but cannot be applied to monthly membership fees.

**0-29 days prior to scheduled Workshop Start Date** | No refunds or credits will be issued.

## TRANSFER POLICY

Transferring a registration from one scheduled workshop date to another workshop date must be received in writing via email to support@howtomanageasmalllawfirm.com by the deadlines outlined below. HTM does not guarantee that future dates will be made available for any given workshop.

**30+ days prior to scheduled Workshop Start Date** | Registrant may transfer their registration to a future workshop pending space availability.

**0-29 days prior to scheduled Workshop Start Date** | Registrant may not transfer to a future date and refunds will not be issued.

Workshop registrations may be transferred to another person any time by notifying events@howtomanageasmalllawfirm.com. Transferring of the registration will not transfer the responsibility of payment from the original purchaser. Transfers to non-members requires written approval from HTM. Non-members may be required to pay the difference between the member price and non-member price to effectuate the transfer.

## GUEST INFORMATION

GUEST NAME: \_\_\_\_\_ GUEST PHONE: \_\_\_\_\_  
GUEST EMAIL: \_\_\_\_\_

PRINT NAME: \_\_\_\_\_ CELL #: \_\_\_\_\_

PLEASE SIGN: \_\_\_\_\_ DATE: \_\_\_\_\_

OFFICE USE ONLY: Completed by \_\_\_\_\_ DIC \_\_\_\_\_