
Transferring Member Checklist

The strength of BNI® is in the relationships that we build. Those relationships take time and commitment to one another to build and maintain. When someone joins a chapter they make a commitment to the chapter and its members. That commitment should be taken very seriously both by the Membership Committee and the applicant.

On occasion that commitment changes and a person may need or want to transfer to a different chapter. Reasons for transferring include relocating to another city; territory has been reassigned; changing jobs to a new classification that is filled in the current chapter; or a new chapter has opened in a more convenient location. This is a 2-3 week transfer process.

BNI Administrative Policy #8: A member requesting to transfer from his/her current chapter to a new chapter will be required to submit a completed new Membership Application to the Membership Committee of the new chapter. In addition, if the member has less than 12 months of paid membership credit, he/she must submit a renewal payment. Or, if the member has more than 12 months of membership, no additional investment is required. Upon acceptance into the new chapter, the credit from his/her previous chapter will be added to his/her membership in the new chapter as well as the renewal time, if applicable.

Transferring Member's Responsibilities

- Visit the chapter into which you wish to transfer. Obtain a **Request to Transfer Form** and a new Membership Application.
- Notify your current chapter's Leadership Team and submit your resignation. This will make you temporarily a non-member in good standing and allows you to apply for membership in another chapter. (CAUTION: This means that you must resign from your current chapter in order to apply to another chapter. If you resign from one chapter and are denied to the other, your former chapter has no obligation to accept you as a member back into their chapter.)
- Complete and submit the **Request to Transfer Form** to your Area Director to receive approval prior to proceeding. Once approved, the form must be submitted to the BNI Regional Office.
- Submit the following to the Vice President of the Chapter you wish to apply to:
 - New Membership Application with appropriate participations fees
 - Your completed, approved **Request to Transfer Form**
 - Your current Personal PALMS Report (see BNI Connect®) or your current Power of One Report
 - Your former chapter Vice President name and contact information
- Recommended: Replace yourself in the chapter from which you are transferring with either someone in your profession or in another profession.
- Attend the Member Success Program within 60 days of approval if it has been more than 6 months since attending.



Membership Committee Responsibilities

- Process the Membership Application of the transferring member as if they were a new member of BNI®.
- Contact the transferring member's previous Vice President:
 - What is the attendance status of the transferring member?
 - Is the transferring member in good standing?
 - Are BNI Participation Fees and chapter fees paid and up-to-date for the transferring member?
 - What is the transferring member's due date?
 - If the transferring member reapplied to be a part of your chapter, would you accept them?
 - Note: If the previous Membership Committee is not available, please contact the BNI Regional Office.
- If the application is approved, have the Secretary/Treasurer upload the office copy of the transferring member's application and the transfer request form to Exavault. Then have member pay their minimum of one year's participation fees on the Reginal website or mail check to BNI Regional Executive Admin., if applicable. Mark the payment box with the words: Transfer from XXX Chapter / Approved by XXX Director/Director Consultant.



Transfer Request Form

A Member in good standing, requesting to transfer their membership to another chapter, must complete and submit this form for approval and signature of their Executive Director or Regional Office staff.

Upon approval of this Request to Transfer Form by the Executive Director or Regional Office staff, the member should then submit this completed form along with a completed new Membership Application to the Vice President of the chapter they wish to transfer to.

To make a long-term commitment to the new chapter, along with the approved Request to Transfer Form and the completed new Membership Application, the member will be required to submit a minimum one-year membership fee to their new chapter if they have less than 12 months remaining on their current membership. Upon acceptance by the Membership Committee of the new chapter, the remaining months the member has left from their former chapter will be added.

Step One: Member's Request

Member Name: _____

Company Name: _____

Phone: _____ Fax: _____

Email: _____

Chapter Transferring FROM: _____ Last Date Attended: _____

Vice President Name: _____ Phone: _____

Request to Transfer TO: _____ Effective Date: _____

Reason for Transfer: _____

Please get Area Director approval then submit to the BNI Regional Office by fax or email PRIOR to proceeding with transfer.

Step Two: Area Director Approval

Approved Denied

Area Director Signature: _____ Date: _____

Step Three: Executive Director Approval

Executive Director Signature: _____ Date: _____

Number of Months Remaining to Transfer: _____
(Will be officially determined when application is received in the BNI Regional Office.)

Comments: _____