



Application Process

Thank you for your interest in the Ottawa Chapter of the Entrepreneurs' Organization (EO Ottawa).

EO Ottawa's mission is to engage leading entrepreneurs to learn and grow while maximizing the entrepreneurial lifestyle. EO—for entrepreneurs only—is a global community that enriches members' lives through dynamic peer-to-peer learning, once-in-a-lifetime experiences, and connections to experts. EO is the catalyst that enables entrepreneurs to grow and to learn from each other, leading to greater business success and an enriched personal life. EO is the largest entrepreneur's organization in the world.

This document will provide you the information needed to apply for membership.

Who May Apply to EO?

EO Requirements: The minimum requirements to join EO Ottawa are:

OWNERSHIP

Sole Founder or Founding Partner with equal equity or Managing Partner with 25% Equity

REVENUES

Annual gross income above US \$1 million per year or investment backed companies with funding over \$2 million if pre-revenue

**Commission based business must exceed \$1 million in commissions*

EO Ottawa is a private membership led organization. Applicants should understand that members are expected to share their experiences and wisdom with other members (peer-to-peer learning). Members run EO's programming, events and structure. It is expected that all members will take a minor role on a committee or at a forum group level at some point in their EO membership.

EO Ottawa's core values are used as a gauge of whether an applicant would be a strong and contributing participant in our member run organization. These values are:

Trust and Respect — Each of us is unique and equal. We listen with an open mind and appreciation for different points of view. This value is fundamental to EO. Through trust and respect, we create a safe space where you can always be your complete, authentic self.

Thirst for Learning — We have an insatiable curiosity. Learning is a big part of why entrepreneurs choose EO. We actively pursue learning so we can continue to grow. We always pursue new ideas and perspectives, at every opportunity, because we always have a burning need to grow.

Think Big, Be Bold — We innovate, take risks and see opportunity in a challenge. We want to make the world a better place—for our teams, our families our communities, and for humankind. We think big, we are bold. We want to make a difference beyond ourselves—for the people in our lives, for a better future for everyone.

Together We Grow — We are committed to each other's growth and well-being. We build deep human connections across rooms, cities, countries and continents. Our community is inclusive, and we value diversity. We are from different cultures, religions and backgrounds, but EO binds us together.

The Application Process for EO Ottawa

EO Ottawa accepts a limited group of new members at quarterly intakes: usually January, April, July and October, of each year.

The application process is designed to provide you with insight into whether EO is right for you and ensuring that you will be a valuable contributing member our group.

Completing this process is not a guarantee of admission and the board maintains the right to not extend an offer of admission to all applicants. Candidates are considered solely on merit and meeting EO Ottawa's by-laws and core values.

Overview of steps in the process

1. Online Application
2. Application Interview with Membership Chair
3. EO Board and EO Member Review and Approval
4. Provision of Qualification Documentation
5. Attend Forum Training once accepted to the Chapter

Step 1 — Online Application

Complete the online application (www.eonetwork.org, click Apply for Membership). The site will ask for a valid credit card. Please note: nothing will be charged to your card until:

- a) you are approved as a member; AND
- b) you accept EO Ottawa's offer to join the Chapter

Step 2 — Application Interview with Membership Chair

Once the application has been received, the prospective member will receive a call from the Membership Chair to conduct a brief interview, to review the application, and to answer any questions.

Important: Applicants are selected for a particular intake based on a variety of reasons, such as where they are on the applicant list, number of available spots in forum groups and what industry their business is in. There are several industries that are more popular than others among EO Ottawa's membership. This causes challenges in Forum placement due to competition concerns.

Step 3 — EO Board and EO Member Review and Approval

An application to join EO will be reviewed and accepted first by the Membership Chair, then by the EO Board. Board members will be given 24 hours to approve your application.

Once approved, your name and company name will be circulated to the EO membership for its approval. Membership will be given 48 hours to approve your application.

Step 4 — Provision of Qualification Documentation

Once you have been approved by the Membership Chair, the EO Ottawa Board and the membership at large, we will require the following documentation:

- a. Revenue Verification Form completed by your external accountant; AND
- b. Proof of Ownership (CORES Search);
- c. Reference from EO or YPO member, if possible.

The Membership Chair will provide the verification form and can answer questions about CORES searches.

Documentation to be provided to EO Chapter Manager, Kajal Agarwal (kagarwal@eocanada.com). Documentation not received by specified date will push your application to the next intake of new members.

Step 5 – Attend Forum Training (once accepted to the Chapter)

As the number one rated benefit of EO, you will be asked to take complete mandatory forum training with other new EO members and a trained facilitator. Acceptance of your application to EO is conditional upon your confirmation that you will attend this day of training. Date will be provided well in advance so you can mark off in your calendar.

Asked to Join EO Ottawa?

Here is what you can expect in the first 30 days.

- Once the above steps are completed, you will be asked to confirm that you would like to accept the invitation to join EO Ottawa, and that we may charge your credit card on file with membership dues. Dues will be pro-rated depending on the month you are invited to join (EO's fiscal year is July 1 to June 30). First year dues in EO Ottawa are currently: \$8,500.00 USD, broken down as follows:

ANNUAL GLOBAL DUES	GLOBAL ONE-TIME INITIATION FEE	ANNUAL CHAPTER DUES	APPROX. COST TO JOIN AT START OF EO YEAR (JULY)
\$2,630.00 USD	\$3,500.00 USD	\$3,150.00 CAD + HST	\$8,500.00 USD

* NOTE: Dues will, however, be prorated and therefore will be less, depending on the month you join.

- There will also be a financial commitment to your forum group of between approx. \$3,000.00 and \$8,000.00 CAD per year, depending on your forum group. Be sure to ask questions about forum dues when you are thinking about joining a particular group.
- You will receive an EO login and password to access the EO website. This login will come from the EO Global office within the first week of your dues being processed.
- Register for Events! You will receive "evites" for EO Ottawa events 1 month prior to a particular event. Registration is easy - simply click the registration button at the bottom of an "evite" and follow the instructions.
- Our Member Engagement Chair, Pascal Denis, will contact new members approximately one week after your join date to arrange a welcome meeting. This will be very important to help you learn the ins and outs of EO membership.
- Forum Training is recommended as soon as you commence your EO membership. Forum is an essential part of your EO experience, and this training will provide valuable tools for your Forum experience and takeaways you can use in your business. Forum Training takes a full day (8:00 am - 5:00 pm) and is necessary for you to be placed in a Forum Group. Attendance at the scheduled Forum Training session is mandatory. If you are unable to attend training, your application will be put over to the next intake of new members.
- Following your Forum Training, the Forum Chair will be in contact with you to discuss possible openings in existing forum groups, or give you an estimate on wait times for an opening. Please note that placement into a Forum Group could take between 3 - 6 months. All efforts will be made to place you into a group as soon as possible. Until that time, we hope that you enjoy all the other benefits that EO has to offer!

Questions about the membership process?

Please feel free to reach out if you have any questions.

Todd Neilson, EO Ottawa Membership Chair — tneilson@optimummech.com