

# Pinnacle Partnerships

*"Empowering Exceptional Partnerships: Elevating Transactional Excellence, Cultivating Dynamic Collaboration, and Driving Industry Standards Through Co-Marketing Excellence and Referral Synergy."*

## Founding Origination Meeting

Tuesday, June 4 @ 8:30am via MS Teams Meeting

### Meeting Agenda

Opening

Co-marketing Agreement

What is our Why?

Pinnacle Partnerships  
Partner Member

Rich Van Orden  
Round Table Introductions Each Attendee

How it works

Member Partner Directory	PP Dashboard Portal – Member Profile
Transactional Support	PP Dashboard Portal - Transaction Portal
Referral Network	PP Dashboard Portal – Member Directory
Knowledge Network/Lobby Interests	Best In Class Development & Industry Initiatives
Social Media Marketing	Sites Intended – Current Member Collateral
Content Creation	Monthly Ideation
Partnership Branding	Logo, Seal – Website, Email Signature... Other(s) Optional
Partnership Policies/Process	Pledge, Engagement, Security/Privacy, Best Practices – Consumer Choice (3) Referrals

Pinnacle Partnerships Timeline

Rich Van Orden

Partner Member Recruitment  
Consumer Access  
Transactional Integration  
Social Media  
Content Creation  
Other: Blogging  
Live/Recorded Webinar Events

Goals Each Partner Member  
Partnership Transactions (Work Committees) & Special Initiatives (Program Committees)

Review Action Items

Other

Next Meeting