

## Supporting trade associations with a fully integrated suite of services.

We provide comprehensive support that drives growth and impact. We adapt our approach to fit each industry's unique challenges and goals while delivering seamless execution across every functional area.



### Membership Management

- Schedule and host in-person and virtual meetings
- Manage and maintain membership records
- Track renewals
- Collect dues
- Membership planning and recruitment
- Hold member onboarding and informational calls



### Financial Services

- Day-to-day accounting
- Quarterly and annual reporting
- Account reconciliation
- CD and investment account management
- Organize and manage yearly budgets
- Bill payment and invoicing
- Meet with board treasurers and accountant
- Gather tax return information



### Events and Marketing

- Plan, coordinate, and promote meetings and events, including annual meetings, lunch and learns, webinars, and large in-person gatherings
- Tabling events at the Maine State House
- Social media and website design and management
- Member email blasts



### Administrative Services

- Screen phone calls, emails, and mail
- Manage Association calendar
- Take notes during key meetings
- Reports for Ethics Commission and Secretary of State
- Schedule facility tours with legislators and interested parties
- Participate in annual strategic planning initiatives

### Representative clients:



**Grace Terry**

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