

# Accomplish



## CX Forum – terms of membership

12 November 2020

**GenieShares**

Proud to share our hopes and  
dreams with our local community  
[www.genieshares.com](http://www.genieshares.com)

# Terms of membership 12 November 2020 (1 of 3)

## 1. We are Accomplish

The Asset Management Client Experience (CX) Forum (Forum) is managed and operated by Acc Cons UK Ltd, trading as Accomplish. We are registered in Scotland with registered number SC613805. Our registered address is at 3 Walker Street, Edinburgh EH3 7JY, United Kingdom.

## 2. About these terms

Thank you for taking the time to read these terms. They set out the basis of your membership of the Forum. Details of the Forum can be found on our website at <https://www.accomplish.world/asset-management-cx-services/asset-management-cx-forum/> We continually develop the Forum and its research. Please re-visit the page above to stay up-to-date.

## 3. About the Forum

As a discipline, CX is still in its infancy. This is particularly the case in the context of business-to-business asset management. The Forum is a virtual and in-person meeting place for the asset management CX community to exchange ideas, develop solutions to industry-wide problems, and extend the leading edge of CX across the industry. The Forum is free to all, as Accomplish's gift to the community.

## 4. Member commitments

To become and remain a member of the Forum, firms should participate in reasonable research and development (R&D) initiatives such as online surveys, working groups, and research projects.

Separate to its R&D activities, the Forum comes together three times per year to review the findings of its latest R&D, and to agree on the scope and approach of new initiatives.

We encourage members to participate in the CX Maturity Benchmark, through which you can learn the common language and definition of CX, understand the absolute and relative strength of your organisation's CX capability, and find out the issues they face. This will enrich your experience of the Forum but it is a distinct service for which Accomplish charges separately.

## 5. Our use of your information

Members of the Forum are entitled to participate in R&D projects designed to unearth peer-group insights and solve industry-wide issues together. To participate, members will provide information about their firm's arrangements on the topic being researched.

Your firm's submissions will be used to create industry-level analysis that will be reserved for the contributors. We will treat all submissions as confidential information and will use them only for the stated purposes. All submissions will be anonymised and will not be made available to anyone.

## 6. Personal data

Please review our privacy policy for information on how we process personal data. However, personal data does not form any part of the Forum's R&D activities. <https://www.accomplish.world/privacy-policy/>

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## 7. Mutual non-disclosure agreement

R&D analysis, findings and other material prepared by Accomplish in connection with the Forum are proprietary to Accomplish and are of central importance to many of our business activities. We rely on members of the Forum to respect and observe the confidentiality of this material.

In these terms, confidential information means all confidential information relating to the Forum and its discussions, which Accomplish (or any of our representatives or group companies) directly or indirectly discloses to you or representatives of your firm. This includes, but is not limited to:

- The analysis, findings or other material relating to any R&D conducted under these terms of membership;
- Methodologies, tools and response plans developed through R&D projects;
- All data processed in connection with the Forum and any other regional or sectoral variants together with all conclusions based on such data, including data collected from you and other industry members once anonymised and processed into statistical form;
- The contributions of Accomplish and its representatives or group companies at any Forum meeting, together with the contributions of other Forum members;
- Any other information provided by us which is by its nature confidential, identified as being confidential, or which is subject to a duty of confidentiality, together with any trade secrets, know-how, processes, technical information, software, analysis and findings and any material subject to copyright.

Information is not confidential information if:

- It is generally available to the public other than as a result of a breach of any duty of confidence (except that any compilation of otherwise public information in a form not publicly known shall be treated as confidential information);
- You can show that it was lawfully known to you on a non-confidential basis before it was disclosed by Accomplish or our representatives or group companies;
- You and Accomplish agree in writing that the information is not confidential.

In return for Accomplish making confidential information available to you, you agree to:

- Keep that confidential information secret and confidential;
- Not use the confidential information in any way except for internal management purposes;
- Not directly or indirectly disclose or make available the confidential information to any other person, other than an officer or senior employee of your firm who needs to know the information in connection with your internal management purposes and who is made aware of the confidential nature of the information;
- Be responsible for the actions of any officer or employee with whom the confidential information is shared;
- Not make any copies of the confidential information except as strictly required for internal management purposes; and
- Treat the information securely and as carefully, and to at least the same standard as you treat your own confidential information.

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Nothing in these terms prevent you from communicating the confidential information to the minimum extent you are required to do so by any court, regulatory authority, taxation authority, the rules of any listing authority or stock exchange or by any law.

If you wish to use or disclose the confidential information in any way not permitted by these terms, or if anything is unclear, please contact us.

## 8. Intellectual Property

Save where the law provides otherwise or unless we agree otherwise with you in writing, Accomplish and our licensors retain the copyright and all other intellectual property rights in the Forum and in any other material produced by us.

The disclosure of such material does not grant any proprietary interest or right in that material, save that whilst you remain a member of the Forum you may use such material in connection with your own internal business purposes and your participation in the Initiative.

## 9. Personal agreement

Your rights under this agreement are personal to your firm. You may not allow other persons or firms to make use of your membership of the Forum, even if they are your affiliates or group companies.

## 10. General

These terms and the documents referred to in them represent the entire agreement and understanding between the parties as to your membership to the exclusion of any prior agreements or representations given by either party.

An agreement not to do something includes taking reasonable steps to prevent that thing being done.

We reserve the right to update these terms and any renewal of your membership will take effect on the terms published at the time of your renewal. The date of these terms' most recent update is displayed above.

If any part of these terms is held invalid or unenforceable this will not affect the remaining parts which shall continue in full force and where necessary as if the offending part were modified by legal requirements.

If we fail to enforce any provision of these terms, this shall not constitute a waiver of any future enforcement of that provision or any other provision.

These terms and their enforcement are governed by the law and jurisdiction of England and Wales.