

# **AMC Institute**

## **Policy on Membership Requirements for Affiliated, Subsidiary, and Multi-Brand Companies**

### **Purpose**

This policy establishes guidelines regarding when affiliated, subsidiary, or commonly owned companies must obtain separate AMC Institute memberships. The intent is to ensure fairness, transparency, and appropriate dues assessment based on how member firms present and operate in the marketplace.

### **Scope**

This policy applies to all existing and prospective member Association Management Companies (“AMCs”), including firms operating under parent companies, holding companies, or other shared ownership structures.

### **Policy Statement**

Membership in the AMC Institute is tied to how a company operates and is represented in the market. **Each distinct in-market brand or company name that conducts business as an AMC is required to hold its own separate AMC Institute membership**, regardless of ownership or corporate affiliation.

### **Membership Requirements**

#### **1. Affiliated Member Firms Maintaining Separate Brands**

When a member AMC acquires another AMC that is already a member, and both entities continue to operate under separate brand names, each entity must:

- Maintain its own separate AMC Institute membership; and
- Pay dues based on its own independent revenue.

#### **2. Acquisition of a Non-Member Firm Where the Brand Is Retained**

When a member AMC acquires a non-member AMC and elects to retain the acquired firm’s brand, the acquired firm must:

- Obtain a separate AMC Institute membership; and
- Pay dues calculated on the revenue attributed to that branded entity.

#### **3. Acquisition Where a Separate Brand Is Discontinued**

When a member AMC acquires another firm but does not retain the acquired firm’s brand, and the acquired operations are integrated under the member’s existing brand:

- Only one membership is required; and
- Dues are calculated based on the combined revenue of all offices operating under that unified brand.

#### **4. Operations Located in Countries With an Established AMCI Institute Chapter (e.g., Canada)**

In countries where the AMC Institute has an established chapter, any member AMC with offices or affiliated companies operating in that country, whether under the same brand or a different brand, must:

- Hold a separate, independent membership for the country-specific office or company; and
- Pay dues for that separate membership based on the revenue of that office or company, regardless of ownership structure.

This requirement applies to both brand-distinct and commonly branded operations within that country.

#### **Rationale**

This policy ensures the AMC Institute membership model reflects how AMCs engage with clients, prospects, and the broader industry. Brand-distinct operations function as separate entities in the marketplace; therefore, separate memberships ensure accurate representation, equitable dues, and consistent application of Association standards and benefits. Additionally, for offices or companies operating in countries where the association maintains a formal chapter (e.g., Canada), independent membership supports the sustainability and development of the chapter and ensure the in-country office or company can fully participate in and benefit from chapter-sponsored programs and activities.

#### **Compliance and Verification**

AMC Institute reserves the right to request documentation to confirm ownership structures, branding decisions, and revenue reporting to ensure proper classification under this policy.

Approved by the Board of Directors on: December 12, 2025