

**CONSULTANT TO CONSULTANT  
AFP/CONFR THURSDAY NOVEMBER 3<sup>RD</sup>  
FROM 2:15 - 3:30 PM**

Please contact me in advance if you have a hot topic or question you want discussed.

**Suggested Topics for 2011  
session:**

Do you do any kind of "exit survey" with clients when you are completing a project with them? -- Either a written/online survey or a conversation, do you ask for a testimonial, a reference, When??.

One potential issue of interest to me is the use of retainers and divergent client-consultant expectations of time use of retainers (producing "products", vision

building,...)

How can Consultants “Sell” or receive compensation for related third party products and services and still adhere to the AFP code of ethics?

From the AFP code of ethics.

## **COMPENSATION AND CONTRACTS**

21. Members shall not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder’s fees or contingent fees. Business members must refrain from receiving compensation from third parties derived from products or services for a client without disclosing that third-party compensation to the client (for example, volume rebates from vendors to business members).

22. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members’ own organizations and are not based on a percentage of contributions.

23. Members shall neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.

24. Members shall not pay finder's fees, commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.

25. Any member receiving funds on behalf of a donor or client must meet the legal requirements for the disbursement of those funds. Any interest or income earned on the funds should be fully disclosed.