

# Coalition Agreement Paperwork Primer



**So you have decided on Coalition Agreement. What does that entail? And what do you need to do to get started?**

*Let's dive in.*

## How It Works

A Coalition Agreement is needed when locations are owned by different merchants but want to share gift cards to be loaded and redeemed at each location. With this agreement, cards used for gift or rewards are now universal in nature and can be used at any of the participating locations.

## TERMINOLOGY

### Merchant Requirements

Each merchant will complete their section with DBA, Address, Name, Signature and Date.

### Form Submission Date

This form should be submitted at the same time as the gift application, when new owners are adding their locations to the chain or if boarding a large new chain that has multiple owners.

## COMPLETING THE PAPERWORK

First things first, a franchisor must be selected. The franchisor takes full legal and commercial responsibility for all customer funds loaded onto the "universal gift/rewards card".

Once the franchisor has been chosen, they must fill in their business' name, address, their personal name, title, followed by their signature and the date it was signed.

Next, the other participating businesses must do the same.

Once everyone participating in the agreement has completed filling out that information, you're done!

With a **Coalition Agreement**, several businesses can come together and benefit from a universal gift/rewards card. This makes it extremely convenient for the customer and will translate into more frequent use of the cards.

## HEARTLAND GIFT COALITION ADDENDUM



☐ MID(s) \_\_\_\_\_

The purpose of this document is to confirm the desire of a group of independent businesses owners (the parties), as identified below, to utilize the Heartland Gift product such that the card is universal in nature (universal gift/rewards card) and whether being used as a gift or rewards card it can be loaded and redeemed (balance, void, reversal as well) at any of the participating parties' locations.

The business as identified by the term "Franchisor" below takes full legal and commercial responsibility for all customer funds loaded onto the "universal gift/rewards card".

By signing below the parties agree to allow the "Franchisor" rights to have full visibility to all transactional information for all locations listed for the purpose of the financial administration of the program.

Franchisor:

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Other Participating Businesses (Franchisees):

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Other Participating Businesses (Franchisees):

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Other Participating Businesses (Franchisees):

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Other Participating Businesses (Franchisees):

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Other Participating Businesses (Franchisees):

Business Name \_\_\_\_\_

Address \_\_\_\_\_

Print Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_