

# BALANCEDLIFE™

a budgeting simulation

## PURCHASE AGREEMENT

Licensors: Cornerstone Credit Union Foundation, the 501(c)(3) public charity of the Cornerstone Credit Union League.  
6801 Parkwood Blvd., Suite 300, Plano TX 75024

Organization: Partner Name  
Address

Licensors and Organization agree as follows:

Payment - Company agrees to pay to Licensors the one-time fee noted for each purchased program on the effective date shown on Schedule A (below). The one-time fee is nonrefundable, regardless of early termination by either party.

## SCHEDULE A: PURCHASE/RENTAL/FACILITATOR COSTS

### BALANCED Life: A Classroom Simulation

\$2,000 for purchase

Sales agreements will be provided within three business days of verbal commitment. Delivery of Program will take place within ten business days of signed sales agreement & receipt of company logo.

### BALANCED Life: A Reality Fair

#### Purchase ONLY

\$3,500 + Shipping

#### Facilitation ONLY

\$250 + Travel

#### Purchase & Facilitation

\$3,500 + Shipping + \$250 + Travel

Sales agreements will be provided within three business days of verbal commitment. Licensors will then collect the signed sales agreement, payment, and logo from the Organization. Delivery of Program will take place within 15 business days of payment and receipt of company logo.

### BALANCED Life: Bundle (A Reality Fair & A Classroom Simulation)

#### Purchase ONLY

\$5,000 + Shipping

#### Purchase & Facilitation

\$5,000 + Shipping + \$250 + Travel

*\*\* Please see above for Reality Fair facilitation only fees*

Organization understands that a separate invoice will be presented for the shipping cost associated with BALANCED Life: A Reality Fair.

**License Grant-** Licensor grants to Organization a limited license to use, print and copy the materials only for the purpose of conducting budget simulations and reality fairs in accordance with the purchased program, and to distribute the materials only to those who attend such simulations and fairs. Company agrees not to exceed the scope of this license.

**BALANCED Life: A Classroom Simulation Program Materials** – Program materials are provided electronically and include an Introductory webinar, a Facilitator’s Guide, a Pre and Post classroom lesson, a PowerPoint presentation that drives the lesson, and 30 profiles for three (3) Cost of Living environments. Each is branded with Company's logo and contact information at Company's request. Content and materials provided for general understanding only and are not intended to replace professional, legal or other advice.

**BALANCED Life: A Reality Fair Program Materials** – Program materials are provided as a kit and include the following: an Introductory webinar, a Facilitator’s Guide, ten (10) tabletop banners , 150 Laminated pricing sheets used for making financial decisions at the booths, 30 profiles for three (3) Cost of Living environments, a Pre and Post classroom lesson, and a game wheel. Each can be branded with Company's logo and contact information at Company's request. Presentation content and materials provided for general understanding only and are not intended to replace professional, legal or other advice.

**Licensor's Copyright Notice** – Organization agrees that all copies of the materials, in whole or in part, will preserve and include Licensor's copyright notice, as it currently exists on the original materials.

**Modification** – Organization agrees that any modification to any part of the Program will be made with approval of Licensor.

**Term and Termination** – The term of this Agreement shall commence on the Effective Date. Organization may continue to use the Program materials, in their current form, for an indefinite period, as determined by Organization.

**Confidentiality** – The parties agree that the information, correspondence, materials, intellectual property, trademarks, data, reports, and other information and materials exchanged between the parties or to which a party may have access to is considered confidential and proprietary to the disclosing party. The receiving party shall treat all such information and documentation as confidential and not disclose, share, or allow access to such without the written consent of the other party, except as required by the receiving party to fulfill the obligations of this agreement to persons who have a need-to-know. Each party represents that it will not knowingly provide any false, misleading, or inaccurate information and confidential information shall not be collected, aggregated, or used outside the scope of the terms of this agreement. All confidential information shall be protected using reasonable security precautions and measures and such confidential information shall be returned or destroyed upon any termination of this agreement.

**ORGANIZATION**

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

\_\_\_\_\_  
Date

**CORNERSTONE CREDIT UNION FOUNDATION**

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

\_\_\_\_\_  
Date

