



## Benefits and Requirements

Every Preferred Partner receives specific benefits in their contract. Additional marketing and advertising opportunities are available and are contracted at an additional cost. Please refer to the Preferred Partner Statement of Work for specific contracted services between the Preferred Partner and Nacha.

Both parties are responsible for ensuring contractual obligations are met for each benefit. Any unused benefit outlined in the Statement of Work will be forfeited with no refunds provided. Detailed requirements for each benefit are described in this document.

### Benefits

#### **Nacha Preferred Partner Director**

Every Partner is assigned a dedicated Preferred Partner Director to ensure contract deliverables are met and is available for monthly check-in calls. The Director is the Preferred Partner's point of contact at Nacha throughout the term. Within two business days following the signing of the contract, the Director will provide the Preferred Partner Listing Form. Each Partner is strongly encouraged to complete and return the form and provide their logo (.eps file with transparent background) within 10 business days of receiving the form. Nacha will use the logo and content from this form for promotion of your company as being named a Preferred Partner (e.g., press release, inclusion on [nacha.org](http://nacha.org)).

#### **Preferred Partner Logo for Partner's Use**

The Director will provide the Nacha Preferred Partner logo and Style Guide within two business days of receiving contract payment. Nacha Preferred Partners may use the Nacha Preferred Partner logo as described in the style guide on their website, in sales collateral, press releases, papers, exhibit booth and/or company communications when they are demonstrating advancement/promotion of the ACH Network. Additionally, Nacha will provide a tabletop sign for the Partner to display on their booth at its annual Smarter Faster Payments Conference reflecting their Preferred Partner status. Nacha encourages the Partner to share its plan to use the logo with the Director, who is available to consult on appropriateness of usage.

The Preferred Partner logo cannot be displayed in a manner to lead the reader to presume that Nacha endorses a Partner's specific product. **Preferred Partners are prohibited from using the copyrighted Nacha logo.**

#### **Promotion on Nacha's Website ([nacha.org](http://nacha.org))**

There are three ways that Preferred Partners gain exposure on [Nacha.org](http://nacha.org):

- 1) Dedicated Partner webpage developed from information provided in the Preferred Partner Listing Form, including a customized URL (e.g., [nacha.org/content/Example-URL-PreferredPartner-Company](https://nacha.org/content/Example-URL-PreferredPartner-Company)), and prime logo placement.
- 2) Inclusion on the main Preferred Partner page ([nacha.org/preferred-partners](https://nacha.org/preferred-partners)). Partner will be listed with name, logo, and category.
- 3) Press release posted in the News section of the Nacha website ([nacha.org/news/press-releases](https://nacha.org/news/press-releases)).

### **Press Release**

Nacha will issue a press release announcing a new Preferred Partner and highlighting its strategic alignment with Nacha's goals to advance the ACH Network.

Within 10 business days after receiving the completed Preferred Partner Listing Form, Nacha will draft the press release using information contained in the form and send it to the Partner for review and approval. It's possible that a release may have more than one round of review.

After Nacha and the Partner approve the press release, Nacha will coordinate the publication date. Typically, this occurs within 10 business days but is dependent upon other Nacha news and holidays. The release will be published via a newswire service, placed on [nacha.org](https://nacha.org) in the News section, and on the dedicated Preferred Partner webpage. Nacha will also promote the release on Nacha's social channels and include it in an issue of the Member NewsLink emailed newsletter.

Nacha encourages the Partner to share/repost the release in its entirety. However, if the Partner wishes to promote Nacha's quote, they must obtain prior approval from the Preferred Partner Director.

### **Nacha Consulting Consultation**

Preferred Partners receive a 30-minute complimentary consultation with Nacha Consulting. Learn more about ACH Advisory Services, ACH Assessments, Product Readiness, Payments Strategy, and Custom Education. For more information, contact Samantha Carrier at [scarrier@nacha.org](mailto:scarrier@nacha.org).

### **AAP and APRP Course Licensing**

Preferred Partners may apply for AAP/APRP course licensing at a reduced rate of \$75 per credit hour (a savings of \$20 per credit hour.). For more information, contact Tryann Delaney at [tdelaney@nacha.org](mailto:tdelaney@nacha.org).

## **Additional Visibility Opportunities**

Nacha offers a variety of additional opportunities that will enhance the Partner's visibility among the payments industry. Partner's contract Statement of Work (SOW) will outline which opportunities (if any) are included at no additional cost. If Partner chooses to add opportunities beyond those in the contract, they are available for an additional fee.

All add-ons must conclude at least 30 days prior to end of contract term, unless otherwise agreed upon. Any unused benefit outlined in the Statement of Work will be forfeited with no refunds provided.

## **Descriptions and Fees for Additional Visibility Opportunities:**

### **Nacha Speaker at a Preferred Partner Event: \$5,000 + travel expenses**

If mutually agreed upon by Nacha and Partner, and as availability allows, a Nacha representative may be made available to speak at an in-person event hosted by the Partner (e.g., user conference, board meeting). The Partner will cover the Nacha representative's pre-approved travel expenses.

### **Nacha's Podcast Channel – [Payments SmartCast](#): \$5,000**

Nacha's podcast channel has more than 5,600 downloads since its launch in November 2020. Payments SmartCast provides a venue for Preferred Partners to be seen as thought leaders and experts while advancing the ACH Network. The format of Payments SmartCast is generally 12-15 minutes in length and presented in a conversational and informal format. Podcasts allow for a deeper discussion into content areas. Upon request, Nacha can develop a corresponding blog post.

Within 60 days upon the execution of the contract, the Partner and the Director will develop an outline, identify available dates and participants to record, provide a timeframe to promote it, and identify the required Partner-supplied marketing assets. The Partner and Nacha podcast moderator will work together to develop questions that will be asked. Nacha will edit the recording and share it with the Partner for review prior to publishing and promoting it. Nacha also encourages the Partner to share the podcast through their channels (e.g., social media, email).

### **Coffee Talk Social or Cocktail Social: \$5,000**

Coffee Talk and Cocktail Socials are unique and exclusive, Preferred Partner hosted virtual events to discuss ACH topics in a live, exclusive, and relaxed atmosphere without formal presentations. The lighter conversational format is less detailed and structured than a webinar, and Nacha staff can informally discuss ACH Network Rules and ACH functionality. Coffee Talk Socials are typically scheduled late morning to mid-afternoon, whereas Cocktail Socials are usually scheduled in the early evening (around 6 p.m. ET) to give a greater opportunity for U.S. West Coast attendees. During these events, Nacha will not provide legal advice.

These events should be 60 minutes or less, hold a maximum of 45 attendees, and occur in a live format. It should be structured in a question-and-answer format and may include several speakers, including Nacha subject-matter experts.

Within 60 days upon execution of the contract, the Partner and Director will finalize the Coffee Talk Social or Cocktail Social date to occur within four months, unless otherwise mutually agreed upon. These events cannot conflict with a scheduled Nacha event.

Within 30 days of the event, the Partner will set up and host a registration page with Nacha's privacy policy included on that page. The Partner will provide the event registration link to the Director.

**Note:** Due to the unique nature of Coffee Talk Socials and Cocktail Socials, the Partner is responsible for inviting their customers and prospects to the event demonstrating the relevance and understanding of the payments industry via its partnership with Nacha. The Partner is encouraged to promote the event

through its own communication channels (e.g., website, email, social media). Marketing language used must be mutually agreed upon by Nacha and Partner.

### **Advertising: -Rates vary**

Advertising is a valuable way to promote a Partner add-on (e.g., webinar, Above the Fold Executive Briefing, podcast) or for a solution or collateral piece written outside of the Partner contract SOW. Content must focus on the advancement/promotion of the ACH Network and will be reviewed and approved by Nacha. All artwork will be created by Partner in the formats and sizes outlined in the Preferred Partner Advertising Specs. There are three types of advertising that Nacha offers and rates vary for each. Additional details are available in [Nacha Media Kit](#):

#### **1. Targeted Display Ads: \$5,000**

The Nacha website (nacha.org) has over 2.25 million annual visitors with over 4 million page views. The Partner's ads are served to these customers via targeted campaigns aimed at financial institutions, payments companies and corporations of all sizes.

#### **2. Nacha Operating Rules Online: from \$2,000**

Partner ads are placed on the Nacha Operating Rules Online website that attracts more than 30,000 subscribers who visit throughout the year to access the Rules.

#### **3. Nacha Operating Rules & Guidelines Rule Book Print Advertising: 10% off current rates** With more than 18,000 copies printed annually, this is the go-to resource that ACH payments professionals rely on for the processing of ACH payments.

### **Webinar: \$5,000 (Partner-hosted) / \$7,500 (Nacha-hosted)**

Webinars provide Preferred Partners a forum for thought leadership and are focused on education and advocacy regarding advancement of the ACH Network while also showcasing product/service offerings or demonstration of payments expertise, and the importance of being a Preferred Partner. Webinars are generally 40-50 minutes in length. Webinars will be hosted live by the Partner on their platform of choice (e.g., GoToWebinar, Zoom). Webinars cannot conflict with a Nacha event.

Within two business days following execution of the Preferred Partner contract, the Director will reach out to the Partner to determine the date and topic of the webinar.

Within 60 days upon execution of the contract, the Director and the Partner will finalize the webinar date which must be set within four months, provide a timeframe to promote it, and identify the required Partner-supplied marketing assets.

If the Partner opts for a Nacha-hosted webinar, Nacha will be responsible for creating the webinar landing page, maintaining registrations, and hosting the live webinar through its preferred platform, currently GoToWebinar. The Partner is still responsible for developing the marketing assets for the webinar promotions.

Nacha encourages the Partner to promote the webinar through its own communication channels (e.g., website, email, social platforms) and inform Nacha of the communications.

### **Above the Fold Executive Briefing: \$5,000**

Above the Fold Executive Briefing is an under three-minute read for payments professionals with a title of Vice President or higher. The format is akin to a brief front-page news story that succinctly describes the issue and solution with link for additional information – it should be concise, well-organized and cover the most important and relevant facts and solutions to grab the key decision makers’ interest. The Briefing content should highlight how the Partner advances the ACH Network. The Briefing includes the partner product/service and branding.

Within 60 days upon the execution of the contract, the Partner and the Director will agree on a topic, develop an outline, ensure any Nacha facts/figures/messaging included are most current, identify key audience, provide a timeframe to release and promote it, and identify required Partner-supplied marketing assets.

Not less than 30 days prior to Briefing release date, the Partner will draft a 400-word or less Briefing (designed and cobranding with the Preferred Partner logo) and send it to the Director. Nacha will review and edit it and return to the Partner within 10 business days. The approval of the Briefing may require more than one round of review prior to final publication.

### **Marketing Channels for Nacha-promoted Add-ons**

For marketing of Payments SmartCast, webinars, and executive briefings, the Director will provide promotional dates and identify required Partner-supplied marketing assets for Nacha to execute the selected benefit. Required marketing assets may include graphics/ads, copy, registration landing page, and Partner point of contact. For webinars, the Marketing Director at Nacha will work with the Partner to identify the target audience for the email. Marketing language used must be mutually agreed upon by Nacha and the Partner. If Nacha does not receive the marketing assets by the due date, or if the materials require significant changes, Nacha will make every attempt to accommodate the scheduled promotion date, but the event may need to be rescheduled and promotions held.

<b>Marketing Channels</b>	<b>Nacha’s Podcast – Payments SmartCast</b>	<b>Webinar</b>	<b>Executive Briefing</b>
Nacha.org	X	X	X
Member NewsLink	X	X	X
Paid Social Media	X	X	X
Dedicated Email	X	X	
Inclusion in periodic blog newsletter	X		

### **Marketing for Partner-promoted Add-ons**

The Preferred Partner is responsible for promoting a Nacha speaker at its event, Coffee Talk and Cocktail Socials. The Partner is encouraged to promote these events through its own communication channels (e.g., website, email, social media). Marketing language used must be mutually agreed upon by Nacha and Partner.