

Subject Matter Expert (SME) Membership Application Form

Name of Applicant:

Address:

Phone: (____) _____

E-mail: _____

CERC certificates held (please check all that apply):

_____ [Level I Introduction to Relocation](#) CERC Relocation Specialist™

_____ [Level II Essentials of Domestic Relocation](#) CERP™ (Canadian Employee Relocation Professional)

_____ [Level III Essentials of International Relocation](#) CGMP (Canadian Global Mobility Professional)

Other mobility industry professional designations held:

Current position held by applicant with a brief description of duties:

Job Title:

Job Responsibilities:

Other professional qualifications or memberships held:

Education:

DEGREE	DATE	MAJOR	NAME OF INSTITUTION
Diploma			
Baccalaureate			
Master's			
PhD			
Other designation			

Are you aware of any matters that present you with any actual, apparent, or potential conflicts of interest in your service to CERC?

_____ Yes (if yes, please fully explain on a separate sheet)

_____ No

In order for this nomination to be considered, the following must be submitted with this application:

1. Complete Application Form (signed and dated)

2. Applicant's current resume or curriculum vita

You may also submit a brief cover letter

PLEASE SUBMIT MATERIALS BY EMAIL TO: sme-application@cerc.ca

Please provide the name, telephone numbers (day) and e-mail addresses of up to three (3) references.

Reference # 1

Name: _____

Relationship to applicant _____

Phone: (____) _____ E-mail: _____

Reference # 2

Name: _____

Relationship to applicant _____

Phone: (____) _____ E-mail: _____

Reference # 3

Name: _____

Relationship to applicant _____

Phone: (____) _____ E-mail: _____

Subject Matter Expert Program: Categories of Expertise

A. Areas of expertise within the professional domain (please select no more than 2):

Consulting Services

- Mobility Program Design/Process Improvement
- Policy Development
- Request For Proposal
- Vendor Management
- Audit Move Management Invoices
- Compliance Audits

Corporate Mobility Management (*restricted to corporate member SMEs only*)

- Domestic Mobility Management
- Cross border Mobility Management
- International Mobility Management
- Tax and Global Compensation (including Payroll)
- Global Immigration
- Benefits includes Employee and Family Assistance Program (EFAP), International Medical Coverage
- Security and Risk Management

Corporate Housing/ Temporary Accommodation

- Quality Assurance
- Property Management
- Search Services

Financial Services

- Banking
- Mortgage Services
- Insurance
- Financial Planning

Relocation Services

- Candidate Assessment
- Cost of Living/ Compensation Services
- Destination Services
- Language Training
- Intercultural Training
- Education/ School Search
- Auto Lease

Legal Services

- Visas and Immigration
- Real Estate
- Employment law
- Data Privacy
- Other Legal Services

Mobility Technology/ IT Services

- Mobility Platform
- Reporting
- Cyber Security Management

Moving Services

- Domestic HHG
- Cross border HHG
- International HHG
- Auto Shipment
- Pet Shipment
- Emergency Services
- Permanent Storage
- Insurance and Claims

Procurement/ Supply Chain Management

Real Estate Services

- Home Sale / Purchase
- Appraisal
- Home Inspection
- Property/ Tenancy Management
- Furniture Rental
- Broker/ Agent Services
- Rental Search Services

Relocation Management

- Policy Review
- Relocation Coordination
- Expense Management
- Allowances administration

Tax Services

- Tax Advisory
- Tax Management (Certificate of Coverage, Tax Equalization etc.)
- Tax Filing Services
- Estate Planning

B. SME Application Criteria:

Applicant must be a member of CERC in good standing

1. Applicant cannot be a member of the SME Steering Committee [or Board of Directors of CERC].
2. Applicant cannot apply to be a SME of more than two (2) subject matter areas (each, a "Subject Matter Area/Subject Area")
3. With the exception of Applicants in a regulated profession, (i.e.: Accounting, Law, Appraisal, Tax, Real Estate etc.) Applicant must hold current certification under the CERP Designation program, or CGMP Designation program for matters related to international mobility]
4. Term of appointment of a SME is for two (2) years and may be renewed upon application to the Selection Committee.
5. Applicant must carry valid professional liability/E&O insurance coverage if the SME is a member of a regulated profession to which the Subject Matter Area relates (Accounting, Law, Appraisal, Tax, Real Estate etc.)
6. If a member of a regulated profession, Applicant must be a member in good standing of such profession and cannot be subject to any form of disciplinary action by his/her governing body.

C. Terms and Conditions:

"By signing and submitting this application you acknowledge and agree as follows:

- A. You acknowledge that you meet all the foregoing Application Criteria and will continue to meet all such criteria during the term of your appointment as a SME, if appointed.
- B. Should you be appointed as a SME, which you acknowledge is on a non-exclusive basis, you agree to provide advice to CERC Members in your approved Subject Matter Area(s) only (the "Advice") in a professional, careful, diligent and efficient manner. You also agree that this application and any Advice given on the Subject Matter Area is personal to you and may not be delegated, assigned or performed by any other person, including but not limited to, any person within your organization/employer. At no time shall you use your position as a SME to solicit business on behalf of your organization/employer or engage in any commercial activity with the CERC Members relating to employee relocation. You will not be prohibited from continuing to perform services for such CERC Member under an existing service agreement.

C. Confidentiality

You acknowledge that by being appointed as a SME, in the course of providing advice to CERC Members you may have access to, may obtain or may be provided with information, directly or indirectly, relating to the CERC Member or a third party, which is of a confidential and proprietary nature including but not limited to techniques, processes, programs, documentation, data, employee, customer and client information, intellectual property, existing and/or contemplated products and services, financial and marketing reports, data and statements and current or future business plans and models, regardless of whether such information is designated as confidential, which is disclosed by the CERC Member or a third party (the "Disclosing Party") to you, or learned by you in course of providing the Advice in connection with the Subject Matter Expert Program (collectively, "Confidential Information"). You agree that you shall not use any Confidential

Information for your own benefit or the benefit of others, except with the prior written permission of the Disclosing Party and so long as the Confidential Information is not used at any time for any commercial purpose, and you shall not disclose or reveal the Confidential Information orally, in writing, electronically or in any other form to any third party during the term of your appointment as a SME or at any time after the expiry or termination of your appointment as a SME. All Confidential Information disclosed to you by a Disclosing Party shall be and remain the property of the Disclosing Party, and all copies thereof shall be promptly returned to the Disclosing Party upon written request, or permanently destroyed at the Disclosing Party's option.

- D. If any information contained in this application or the required documentation is determined to be false or misleading, or if you are appointed a SME and you breach any provision of this application, your application will be rejected or your appointment as a SME will be immediately terminated, as applicable, In either circumstance, you will not be eligible to reapply to be appointed a SME [without the consent of the CERC Board of Directors].”

D. Certification:

I hereby certify that all statements and the information/documentation provided in or with this application is complete, accurate and true to the best of my knowledge. Furthermore, I certify that I have attached all required documentation. I understand that no application will be reviewed unless accompanied by the required documentation.”

Applicant Signature

Date