



PARTNERSHIP CHARTER INFORMATION PACKET

Contents

- Building Stronger Partnerships
 - The Partnership Problem
 - Why Align With TPCI
 - What's Included in the PCS™
- What Makes the Partnership Charter Different
 - Firm Success Story
 - Who the PCS Is For
 - Collaborating with TPCI
- Getting Started: Onboarding Steps
- Appendix: Training Details

Dr. David Gage, Ph.D.
Founder

703-465-1262
www.PartnershipCharter.com
DGage@PartnershipCharter.com

The Partnership Charter™ System

Building Stronger Partnerships through Structured Alignment

At a Glance: The Partnership Charter™ System (PCS) is a proven methodology that helps professional advisors guide client partnerships through critical conversations to prevent conflict and maximize success. At the center of the system is the Design Your Partnership™ (DYP™) online tool, which is coupled with comprehensive training and ongoing support to enable your firm to deliver high-value partnership services with confidence.

The Partnership Problem – And How We Solve It

More than 7 in 10 business partnerships fail. Most don't fall apart because of flawed business plans; they fail because expectations are misaligned, roles are vague, commitments are unclear, or crucial conversations never happen. Traditional legal agreements rarely address these deeper interpersonal dynamics, and often don't sufficiently explore issues like money and equity.

The Partnership Charter Institute™ (TPCI™) gives your firm a proven solution. At the center of our system is the DYP tool, which guides partners through over 400 structured questions across 14 key domains – from ownership and money to values, vision, governance, and succession. The result is a 60-90-page Partnership Charter that captures all agreements, understandings, and behavioral commitments among the partners.

Using the DYP tool, your firm can help clients:

- Address interpersonal risks before they derail the business
- Clarify expectations around roles, rewards, and authority
- Build trust through structured, facilitated alignment
- Create a roadmap for handling inevitable challenges

For additional information, visit PartnershipCharter.com.

To become a TPCI licensed Firm, complete a [Firm Information Form](#).

Why Align with TPCI?

For Your Clients:

- Reduce the risk of partnership failure by building structured alignment
- Create clarity on vision, roles, expectations, and decision-making authority
- Build trust through facilitated, candid conversations
- Establish clear behavioral commitments, not just legal obligations
- Create a living document that evolves with the partners

For Your Firm:

- Deliver Deep Client Value: Guide partners through critical business and interpersonal conversations that legal documents rarely touch
- Strengthen Trust and Retention: Deepen your role as a trusted advisor by facilitating alignment that lasts well beyond the engagement
- Differentiate Your Offering: Add a premium, structured service that few competitors can match in depth or rigor
- Generate New Revenue Streams: Most firms charge their regular fees for guiding the 3-day Charter design process, creating high-margin, high-impact work
- Structured Process, Not Starting from Scratch: Access the PCS platform, Guide training, Co-Guide matching, client tools, resources, and live support

What's Included in the Partnership Charter System™

◆ Platform & Core Tools

Component	Platform & Core Tools
PCS Framework	A structured methodology to help business partners launch, build, and sustain new partnerships, or re-evaluate existing partnerships
Design Your Partnership™ (DYP) Tool	Customizable digital workbook that partners complete during the Partnership Charter process. Covers 14 domains including Vision, Personal Styles, Roles & Authority, Contributions & Rewards, Ownership, Money, and Scenario Planning; 3 assessment instruments per partner are also included
Interim Agreement	A tool for clarifying each partner's expectations about the PC process right at the outset of the co-creation process

◆ Flexible Client Delivery Options

Firms can adapt the engagement structure to fit client budget, complexity, and goals:

Engagement Option	Client Delivery Options
Guided	A trained Guide facilitates all client Joint Meetings and manages the Partnership Charter drafting
Partially Guided	Clients self-direct the process with light-touch support from a Guide

◆ Training & Certification

Track	Training & Certification
Guide Training (Level 1)	Required for facilitating clients; covers PCS methodology, DYP navigation, 4 core content areas, facilitation, and application
Advanced Guide Training (Levels 2 & 3)	Optional training for Guides seeking to deepen specialization in complex or high-conflict partnerships; additional fees apply
Principal Training	Role-specific tracks to support implementation, oversight, and operational success

(See the Appendix for details about the different trainings.)

◆ Marketing & Growth Tools for Firms

Component	Marketing & Growth Tools for Firms
Referral Network Listing	Your firm is listed on the TPCI website to increase exposure and generate leads
Marketing Support	Templates, client-facing messaging, and onboarding assets to help firms ramp up
Customizable Web Pages	Professionally-designed web assets that can be rebranded and embedded in your own site or campaigns

◆ Facilitation & Support Resources for Firms & Guides

Support Type	Facilitation & Support Resources for Firms & Guides
Guide Tips	Embedded prompts in the DYP tool assist with sensitive and high-stakes facilitation moments
Co-Guide Matching	TPCI helps firms identify experienced co-facilitators for complex engagements; Co-Guides are used in 25-50% of cases
Reference Library	Manuals, sample Partnership Charters, articles, and other materials to support real-time application and continuous learning
On-Demand Consulting	Available (for a fee) for real-time guidance from TPCI on specific client scenarios
Annual Partnership Retreat Materials	Templates and suggestions for firms to revisit and refine their clients' Partnership Charters with ongoing annual check-ins

What Makes the Partnership Charter Different

Unlike traditional approaches that focus solely on legal structure or interpersonal coaching, the Partnership Charter System™ combines deep interpersonal partner alignment with structured business planning in a single, scalable process.

The TPCI Difference:

- **Proven Methodology:** Developed by Dr. David Gage and tested across scores of engagements, the PCS is used by leading firms in law, executive coaching, consulting, and family business advising to address real partnership dynamics and planning.
- **Complete Toolkit:** Everything you need to deliver results, including a cloud-based tool, customizable client workbooks, built-in Guide Tips, and comprehensive training. The result is a Partnership Charter grounded in negotiated agreements and behavioral commitments.
- **Built for Firm Growth:** Create high-value, high-margin engagements that expand your value proposition and cultivate ongoing client loyalty.

Firm Success Stories

"As a co-founder of an international firm on the forefront of coaching, team dynamics, and emotional intelligence, I've had the privilege of developing and employing some amazing tools for enhancing both personal and interpersonal development in the business environment. [...] With the Partnership Charter process, TPCI has given Mobius and other firms the ability to transform the lives and relationships of co-owners of private companies in almost magical ways.

The Design Your Partnership tool makes partner collaboration nearly inevitable – unless, of course, it wasn't meant to happen, which is also critical for partners to discover if that's the case."

Amy Elizabeth Fox
CEO
Mobius Executive Leadership

"Our firm's mission has always been to support our clients in achieving their exit-planning goals. For some, that means turning over the reins and selling their company to a next generation of co-owners. The new partnership's success is critical and while success can never be guaranteed, having the next generation complete a Partnership Charter is as close as it gets.

"Having one or two Guides from our firm working three-plus days with a typical PC client is a significant investment of our time; it also brings a significant financial reward. That, and the pleasure of getting the best outcome for our clients is why the PC process works so well for us."

Pat Ennis
Founder & Partner
ENNIS Legacy Partners

Who the PCS Is For

The Partnership Charter System™ is built for firms that work with business partners – whether the clients are co-founders, family members, or shared-ownership entities.

◆ How Firms Use the PCS Today

Role	Use Case
Executive Coaches & Peer Facilitators	Help co-founders or business partners align on vision, trust, and leadership norms
Consultants & Strategists	Add a premium offering that prevents misalignment and strengthens client engagement and success
Family Business Advisors	Navigate sibling dynamics, succession, and ownership planning with care, getting real alignment in the Next-Gen
Law Firms & Legal Advisors	Move upstream from legal formation to long-term client alignment and risk prevention

Collaborating with The Partnership Charter Institute

The Partnership Charter System™ is designed to integrate seamlessly into your existing service model. Every firm must designate at least one Principal, who will serve as the main contact with TPCI and oversee the firm's use of the system.

Depending on the size and structure of your team, your firm may also register additional Principals and Guides:

- **Principal:** Oversees PCS strategy and client engagement decisions.
- **Guide:** Leads client facilitation, manages Joint Meetings, and supports Partnership Charter creation using the DYP tool. Successful completion of Level 1 training required.

TPCI offers training tailored to each role. Once training is complete, your firm can begin offering the PCS to clients – either via full facilitation (Guided) or a lighter-touch, mostly self-directed model (Partially Guided), depending on client needs.

Getting Started: Onboarding Steps

1. **Schedule a Consultation:** Begin by [scheduling a consultation](#) with TPCI to discuss the offering, learn about pricing, and ask any questions.
2. **Complete the Firm Information Form:** Access, complete, and submit the [Firm Information Form](#), which includes a brief background on your firm's work with partnerships.
3. **Sign Your License Agreement:** Once your Firm Information Form is received, TPCI will send your Firm License Agreement for signing.
4. **Add Yourself to the PCS and Make a Payment:** Register yourself and any other colleagues you'd like to add and make your payment. If you add other colleagues, they will receive role-specific onboarding as part of their registration process.
5. **Begin Training:** Once you've registered, you (and any others) will receive access to the DYP online platform and the on-demand required training. (Level 1 Training for Guides and training for Principals is included in their respective access fee.)
6. **Launch Client Engagements:** After completing training, certified Guides can begin facilitating client Charter engagements using the DYP platform.

Questions? Reach out to us at Support@PartnershipCharter.com or [schedule a consultation](#).

APPENDIX I: Training Details

The Partnership Charter™ System includes role-specific training to ensure each team member is equipped to deliver and support successful client engagements.

Principal Training

For firm leaders overseeing PCS integration and client strategy

You'll learn:

- How the PCS and DYP tool transform partnership formation and repair
- How to scope engagements, estimate duration, and set pricing
- How to identify high-leverage client scenarios for PCS
- When and how to use Co-Guides effectively
- How to market to family, professional, and corporate partnerships
- What makes partnership dynamics unique across business, law, finance, and psychology

Guide Training (Level 1)

Level 1 is required for new Guides prior to engaging with clients.

You'll learn:

- How to use the PCS methodology and DYP tool to facilitate a successful Partnership Charter engagement
- How to guide clients through over 400 questions across 14 partnership domains
- How to use built-in calendars to maintain engagement momentum
- How to run Joint Meetings and guide Partnership Charter drafting in real time
- How to co-facilitate with another Guide
- The difference between Guided and Partially Guided client models
- How to use 3 assessment tools to stimulate reflection and deepen behavioral commitments
- 5 essential skills for high-trust facilitation and productive negotiation
- The distinction between facilitation and mediation – and when to use each
- How to approach partnership dynamics through lenses of business, law, psychology, and finance
- How to capture and formalize partners' behavioral commitments