

WBAF

# Guidelines

High Commissioners, Senior Senators,  
Senators and International Partners

– Effective retroactively, from 1 April 2021 –



World Business Angels Investment Forum

An affiliated partner of the G20 Global Partnership for Financial Inclusion (GPII)

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### **World Business Angels Investment Forum (WBAF)**

An affiliated partner of the G20 Global Partnership for Financial Inclusion (GPFI), the World Business Angels Investment Forum (WBAF) aims to ease access to finance for businesses from start-up to scale-up, with the ultimate goal of generating more jobs and more social justice worldwide. It is committed to collaborating, globally to empower world economic development by creating innovative financial instruments for innovators, start-ups, and SMEs. The Forum interacts with leaders in all areas of society, first and foremost in business and political spheres, to help assess needs and establish goals, bearing in mind that the public interest is of paramount importance. WBAF engages a wide range of institutions, both public and private, local and international, commercial and academic to help shape the global agenda.

**[wbaforum.org](http://wbaforum.org)**

### **G20 Global Partnership for Financial Inclusion (GPFI)**

The Global Partnership for Financial Inclusion (GPFI) is an inclusive platform for all G20 countries, interested non-G20 countries, and relevant stakeholders that aims to carry forward work on financial inclusion, including the implementation of the G20 Financial Inclusion Action Plan endorsed at the G20 Summit in Seoul, South Korea. Her Majesty Queen Máxima of the Netherlands is the Honorary Patron of the G20 Global Partnership for Financial Inclusion (GPFI).

**[gpfi.org](http://gpfi.org)**

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Please note that in cases where an item in the Guidelines dated 1 April 2021 overlaps with an item of High Commissioner, Senior Senator, Senator, and International Partners agreements signed before, the item in the Guidelines dated 1 April 2021 shall be considered valid. Relevant items in the 1 April 2021 version of the Guidelines therefore supersede the items in agreements signed before that date.

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## Clause 1: WBAF Email

After High Commissioners and Senior Senators are officially appointed, they will be provided a wbaforum.org email address. A password is required to setup these email accounts. Please note:

- For High Commissioners:  
The password will be activated immediately upon their appointment.
- For Senior Senators:  
The password will be activated only after they have attended the first World Congress following their appointment.

WBAF e-mail accounts and WBAF business cards are provided only for the followings:

- Board Members
- High Commissioners
- Senior Senators
- Presidents of International Committees
- President of Research Institute
- Rector of the WBAF Business School
- Secretary Generals of Committees
- Secretary General of the WBAF Business School
- Country Office Directors
- Chairmen of Boards of Country Offices
- Presidents of Economic Development Commissions

## Clause 2: WBAF Business Cards

After High Commissioners and Senior Senators are officially appointed, they will be provided a template to be used for printing their WBAF business cards. Please note:

- High Commissioners are allowed to print their business cards as soon as they receive the template.
- Senior Senators may print their business cards only after they have attended the first World Congress following their appointment.

## Clause 3: International Committees

All High Commissioners, Senior Senators, Senators and International Partners are eligible to become a member of WBAF International Committees. You should select only 1 committee to engage.

Here are the active WBAF International Committees:

- Global Women Leaders Committee
- Global Startup Leaders Committee
- Global Science, Technology and Innovation Committee
- Ethical Governance, Standards of Excellence and Quality Leadership Committee

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You can visit the following link to learn about the vision and the mission of each committee.

<https://wbaforum.org/InternationalDetail/International-Committees/8>

## Clause 4: New Nominations – Responsibilities of Affiliated Partners

Every High Commissioner, Senior Senator or International Partner must nominate a new High Commissioner or Senator or International Partner every year.

## Clause 5: Your LinkedIn Profile

### ■ *Linking a WBAF LinkedIn page to your own LinkedIn profile:*

You may include your position as High Commissioner, Senior Senator, Senator, International Partner and your role as a member of a specific WBAF committee on your LinkedIn profile. However, if you provide a link to WBAF, you must be careful about which link you select.

Three different WBAF links appear when you want to add a company tag to your position.

- World Business Angels Investment **FORUM**:  
<https://www.linkedin.com/company/wbaforum/>
- WBAF Angel Investment **FUND**:  
<https://www.linkedin.com/company/wbaf-angel-investment-fund/>
- WBAF Business **SCHOOL**:  
<https://www.linkedin.com/company/wbaf-business-school/>

You should use **ONLY** the first one: <https://www.linkedin.com/company/wbaforum/>

However, It has come to our attention that some of High Commissioners, Senior Senators, Senators, International Partners have indicated the WBAF Angels Investment Fund or the WBAF Business School as their company link. You are kindly invited to check your LinkedIn profile and re-place the link with the correct link.

### ■ *The LinkedIn headline section:*

You may indicate your WBAF affiliation at the beginning of the Headline section (the section that appears immediately below the photo). If you like, this designation may remain at the beginning of the Headline section for the duration of your engagement with WBAF. However, in the event you are no longer a WBAF affiliated partner, this designation must be removed immediately.

## Clause 6: Guidelines Approved

### ■ **Misuse of the WBAF position, its name and/or logo for non-WBAF purposes**

The World Business Angels Investment Forum cautions all Affiliated Partners that THE following actions are strictly forbidden. High Commissioners, Senior Senators, Senators, and International Partners are not allowed to take any of the following actions as an individual:

- 
- use their WBAF affiliate title (High Commissioner, Senior Senator, Senator or International Partner) in inviting other individuals to put money into any fund they may establish and have an interest in.
  - use the WBAF logo on company websites which they own or have an interest in.
  - give the impression or suggest in any way that WBAF is a partner of any company or NGO that the individual leads or is otherwise involved with.

Please note that the Agreement you signed when you were appointed to your position is strictly between you and WBAF, not between WBAF and any company, NGO, or other institution. As an individual, you are not allowed to use WBAF logo for any purpose without the express written permission of WBAF.

- use their WBAF title for commercial purposes or for any type of financial or commercial gain.
- invite any WBAF affiliate partner to join other organisations you are member of.
- promote any kind of non-WBAF event through any WBAF WhatsApp group without the express written permission from the WBAF Secretary General.
- open or engage in any discussion that relates to political or religious topics in any WBAF WhatsApp group.

#### ■ **Changes to your biodata statement**

The WBAF Steering Committee scored your biodata statement within 30 days of your application. It continues to monitor your biodata statement on a regular basis in order to ensure compliance with your Agreement with WBAF and with the relevant guidelines.

The WBAF Steering Committee may propose terminating your Agreement or propose a change in your status if a significant change occurs in your biodata statement that is not in line with WBAF's guidelines. Such items include membership in any NGO or other organization which is not aligned with WBAF's mission and/or standards.

You are kindly requested to inform the Secretary General as soon as there is a change in your biodata statement, such as a change in your position at your company, institution or NGO and any new engagement with new companies, institutions, and NGOs, etc.

Any of the above actions will result in the immediate termination of the WBAF Agreement of the offending affiliated partner.

### **Clause 7: Termination; Conditions and Actions**

The WBAF Board has specified the following measures:

- The WBAF Steering Committee regularly monitors whether affiliate partners are conforming to the WBAF guidelines. Checks are made on LinkedIn profiles, WhatsApp group messages, and social media shares, and the Committee also investigates complaints received from its members.
- If any of the above-mentioned checks reveals that you have not conformed to the WBAF guidelines, the WBAF Steering Committee will terminate your Agreement immediately. You will not receive advance notice from the WBAF Secretary General. When WBAF does notify you, it will already have closed all WBAF communication avenues that were previously available to you.



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These actions include:

- Canceling your membership in all WBAF WhatsApp groups
- Blocking your WhatsApp number
- Canceling your membership in the WBAF LinkedIn group
- Removing you from the WBAF internal email list
- Removing your email from all WBAF newsletter email lists
- Blocking your access to all WBAF social media accounts (LinkedIn, Facebook, Instagram, Twitter, etc.)
- Blocking your email address, if needed

Please note that the termination of Agreement notification will not specify the reason for termination.

■ When you receive the notification of termination:

- *if your Agreement is terminated within the first 18 months of the Agreement,*
  - you must delete everything related your role at WBAF in your biodata statement and your LinkedIn profile.
  - you will not be allowed to use the link to the WBAF LinkedIn pages, the WBAF logo, or make any reference whatsoever to WBAF on your LinkedIn profile, on your social media profiles, or in your biodata statement.
  - you will not be allowed to promote yourself as a Former WBAF High Commissioner, Senior Senator, Senator, or International Partner.
- *If your Agreement is terminated after 18 months have elapsed since the signing of your Agreement,* you may indicate your previous WBAF affiliation, stating the starting and ending dates of your position as a High Commissioner, Senior Senator, Senator or International Partner in your biodata statements, your social media profiles, and your LinkedIn profile.

- If you persist in making reference to WBAF or any of its committees in your biodata statement or on your LinkedIn or social media profiles, WBAF's legal team will take action, first by registering official complaints with the relevant platforms, and it will resort to legal action if necessary.

## **Clause 8: Upgrading Your Status to Senator or Senior Senator via Institutional Membership**

In pursuing its goals, WBAF engages with a wide range of institutions, and WBAF Institutional Members are significant contributors to the effort. This community comprises well-established influential businesses that advance the development of their industry and the growth of their regional economies. Institutional Members, at the core of all Forum activities, cooperate to find sustainable solutions to global issues. They are typically top-rated high-profile global institutions that play a leading role in their industry and their particular region. They include top global innovators and disruptors that range from niche market leaders to regional champions. Institutional Members also collaborate to address key issues, identify emerging trends and further the Forum's mission of easing access to finance globally.

- The status of International Partners who represent an Institutional Member of the WBAF will automatically be upgraded to Senator position.
- The status of Senators who represent an Institutional Member of the WBAF will automatically be upgraded to Senior Senator position.

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For more information about institutional membership, please click here:

<https://wbaforum.org/Wbaf-Institutional-Member/1>

### **Clause 9: If you wish to partner with WBAF for your event**

An affiliated partner of the G20 Global Partnership for Financial Inclusion (GPFI), the World Business Angels Investment Forum (WBAF) permits the use of its logo in strict compliance with WBAF rules and restrictions.

The WBAF International Headquarters is the sole party with the authority to issue licences and grant permission to use the WBAF logo. WBAF country offices, strategic partners and affiliated partners are not authorized to make any agreement for or give permission for using the WBAF logo, not even for their own companies or NGOs they engage with.

If you wish to partner with WBAF for your event and would like to use the WBAF logo for that event (for example, a roundtable, webinar, conference, congress, etc.), or if you want WBAF Executive Chairman, WBAF Board Members, Board Members of the Diplomacy in Action for Entrepreneurs group, WBAF Business School Rector or Committee Presidents to give a key-note speech, moderate a session or become a panelist in your event; you are requested to proceed as follows:

▶ Step 1:

Complete the Global Partnerships Application Form to start your request

▶ Step 2:

After you complete the online form, your application will go to the Steering Committee, which will determine if partnering with your event creates a strategic value for WBAF at the national, regional or global level. If more information is needed, the Steering Committee may invite you to a Zoom meeting.

- If the Steering Committee finds a strategic value for WBAF, you will be eligible to benefit from the Global Partnership Framework by using the WBAF logo and/or marketing support and/or Speaker support.
- If the Steering Committee determines there is no strategic value for WBAF, the request will be declined.

WBAF Global Partnerships Application Form:

<https://wbaforum.org/WBAF-Global-Partnerships-Application-Form>

### **Clause 10: If you want to establish an Economic Development Commission**

As an affiliated partner of the G20 Global Partnership for Financial Inclusion (GPFI), the World Business Angels Investment Forum (WBAF) believes that bringing together various disciplines can help us design innovative solutions to tackle the world's biggest issues such as access to finance, gender equality, ethical governance, commercialization of scientific research, business transformation and financial inclusion. This collaborative approach will have a multiplier effect in terms of impact.

The WBAF has therefore developed a brand new cluster framework to empower world economies and foster the business transformation of companies through global collaboration and open innovation as a response to COVID-19. Each WBAF High Commissioner, Senior Senator, Senator or International Partner will be able to propose a new Economic Development Commission.



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An Economic Development Commission will be a convergence of entrepreneurs, investors, policymakers, academics, thinkers, and active citizens from the same industry or a sector with a similar background. An Economic Development Commission can only be proposed by a WBAF High Commissioner, Senior Senator, Senator or International Partner.

Please visit here for more information and starting your process:

<https://wbaforum.org/Economic-Development-Commission>

## Clause 11.1: Becoming a Speaker at the WBAF World Congress

There is great interest in speaking at the World Congress (as a moderator, panel speaker, keynote speaker, special session presenter, fireside chat speakers). In order to ensure that different regions of the world are equitably represented and various perspectives are presented, WBAF has established rules for those who wish to speak:

### ■ Making a PRESENTATION AT THE GRAND ASSEMBLY

#### Who can apply?

Senior Senators, Senators and International Partners are eligible to make one presentation at the Grand Assembly.

#### What about topics?

All applications (where content must be specified) must be approved by the relevant steering committee. Topics may be related to global issues, or they may describe, for example, the entrepreneurship ecosystem in your country or present the activities of your company.

#### Assembly Speaker Tickets

Senior Senators, Senators and International Partners must book an Assembly Speaker Ticket before applying to make a presentation.

Assembly Speaker Tickets are for either a 5-minute slot or a 10-minute slot. These tickets are *in addition* to the Congress Ticket.

- Category 1 – Senior Senators, Senators and International Partners: Tickets for a 5-minute speaking slot are €500; tickets for a 10-minute slot are €1000.
- Category 2 – Non-Senators/Non-International Partners: Tickets for a 5-minute slot are €2,000. A 10-minute slot is €3,000.
- Category 3 – High Commissioners: High Commissioners are eligible to address the Grand Assembly only upon invitation of the WBAF Board. Congress Speaker Tickets are not required for this category.

### ■ Becoming a MODERATOR OR PANEL SPEAKER at a panel discussion at the World Congress

The WBAF World Congress hosts at least 5 summits:

- Angel Investor Summit
- Global Startup Summit
- Global Woman Leaders Summit

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- Science, Technology and Innovation Summit
  - Fintech Summit
  - Foreign Direct Investment Summit (FDI)
  - CEO Investors Summit

The conditions for Senators and International Partners

- Applications for speaking will be made online. The relevant link will be available early December.
- The WBAF Steering Committee must approve Senator and International Partner applications for speaking at a summit.
- Congress Speaker Tickets: Congress Speaker Tickets are €1000. This ticket is *in addition to* the Congress Ticket.

Note on Congress Speaker Tickets:

- Congress Speaker Tickets are valid only if the participant has purchased a Congress ticket.
- Congress Speaker Tickets alone do not give you access to the Congress.
- Congress Speaker Tickets are valid *only if* the Steering Committee has approved you as a speaker. (If you are not approved but you have already purchased a Congress Speaker Ticket, the price of the Congress Speaker Ticket will be refunded in full.)

## Clause 11.2: Congress Ticket Fee

Each WBAF High Commissioner, Senior Senator, Senator and International Partner already committed to attending the World Congress, which takes place every third week of February.

Online Conference Ticket:

- WBAF World Congress Registration - discounted rate for the Full Pass (€500)\*

Offline (In-Person) Conference Ticket:

- WBAF World Congress Registration - discounted rate for the Full Pass (€350)\*\*
- Airfare to/from Istanbul Airport
- Airport transfers – around €30 by taxi each way
- Hotel accommodation – 3 nights

\* *Full Pass (€500) includes free entrance to all sessions of the World Congress online.*

\*\* *Full Pass (350 EUR) includes free entrance to all sessions of the offline World Congress, the Community Dinner, the VIP Gala Dinner, and VIP Lunches on Monday and Tuesday.*

Please note that you have to purchase either a €500 Online Ticket only, or you have to purchase €500+€350 tickets. You cannot join the hybrid version by purchasing only a €350 offline ticket. So, if you prefer to join the Grand Assembly and the World Congress online only, it costs €500. If you want to join the hybrid version, it costs €850 + airfare + airport transfers + hotel accommodation.

The WBAF reserves the right to change the dates, venues, the programme and offline ticket prices.

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**IMPORTANT NOTE:** The Congress Ticket link for High Commissioners, Senior Senators, Senators and International Partners will be open until end of December. If you fail to purchase your ticket by 31 December, you will be required to purchase a Congress Ticket at the regular price (€950), and you will not be allowed to participate in the Congress as High Commissioner, Senior Senator, Senator or International Partner. This will mean that your bio will not be printed in the Affiliated Partners Booklet; you will not be allowed to join the Grand Assembly or the Chairman's Reception on Sunday; nor will you be allowed to join the New High Commissioners and Senators Introduction Ceremony part of the Gala Dinner on Monday. It is therefore to your advantage to purchase your Congress Ticket early.

Individuals who wish to attend the Congress but who are not High Commissioners, Senior Senators, Senators or International Partners must purchase a regular Congress Ticket (€950). The regular ticket includes only the Monday and Tuesday events, but not the Grand Assembly.

### **Clause 11.3: Grand Assembly Awards - Virtual**

The Grand Assembly Awards salute individuals or institutions who stand out in imagining, discussing, and shaping the future of an entrepreneurial world. Given the diverse challenges the world is facing in the twenty-first century, it is important to recognise that entrepreneurship can have a major impact on our future, offering new ways to increase economic opportunities and to foster social justice.

The World Business Angels Investment Forum Board aims to contribute to that impact by driving positive support and recognising the global movers and shakers of the WBAF Global Community who facilitate WBAF's global efforts with their personal and institutional engagement. They also promote the WBAF mission in both the economic and social arenas of their networks, a hallmark of the World Business Angels Investment Forum.

The WBAF Board carefully scores the contributions of every High Commissioner, Senior Senator, Senator and International Partner and prepares a list of the many people who have contributed to the mission and vision of WBAF. The Grand Assembly Awards are presented during the Grand Assembly or at the Chairman's Reception on Sunday evening virtually.

### **Clause 11.4: Incentive Programme**

WBAF offers incentives to High Commissioners, Senior Senators, Senators and International Partners whose efforts contribute to the expansion of WBAF's reach around the world. These members are eligible to receive a bonus as a token of WBAF's recognition and appreciation for their efforts.

The main purpose of these bonuses is to support your WBAF related expenses in your initiatives. The conditions are as follows:

#### **■ SPONSORSHIP**

If you mobilise a company or institution in your network to become a partner or sponsor of the World Congress, you receive a cash bonus of €1,000.

Basic Sponsorship Packages: €4,000 including your bonus (regular price is €5,000)

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▶ Package A

The sponsor's logo on the screen at the Grand Opening Ceremony  
The sponsor's logo on the sponsors page of the Congress booklet  
1 Free VIP Ticket for the CEO of the sponsor (not transferable)

▶ Package B

The sponsor's logo on the screen at the Grand Opening Ceremony  
The sponsor's logo on the sponsors page of the Congress booklet  
A banner on the homepage of the *Angel Investor Review* for three months

■ BUSINESS DELEGATION

If you organise a business delegation of at least 5 persons (in addition to yourself) to the World Congress, you will receive:

A bonus of 5% of the paid registration fee for members of your delegation who register by 31 December.

A bonus of 10% of the paid registration fee for members of your delegation who register from 1 January until the Congress starts.

Please note that you cannot get a bonus for the paid registration fee for High Commissioners, Senior Senators, Senators and International Partners.

■ STARTUP DELEGATION

If you organise a startup delegation of at least three startup teams to the Global Fundraising Stage, you will receive a bonus of 10% of the paid registration fee for the startups who register.

### Clause 11.5: Hiring an Exhibition Booth - Virtually

High Commissioners, Senior Senators, Senators and International Partners can hire exhibition booths with a discounted price at the World Congress. You can use your booth to promote your company, business, association or as a meeting point for business meetings at the Congress.

- Bootcamp: Exhibition Booth Area B or C
- Normal price: €6,000
- Your price: €3000

In case you hire more than one booth, simply multiply €3000 times the number of booths you hire.

### Clause 11.6: Appointments between 1 January and 15 February

As the World Congress approaches, the busiest days for the WBAF Board are 1 January and 15 February.

If you are appointed during the 1 January and 15 February period, please note that:

- Because the Affiliated Partners Booklet is printed the first week of the January, your bio will not be included in the booklet.

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## Clause 12: Communication Policies – WBAF WhatsApp Groups

### ■ Current WhatsApp Groups

There are currently 13 WBAF WhatsApp groups. Most probably you are a member of at least one of them (the maximum is three).

- Senators Group
- International Partners Group
- Global Startup Committee Group
- Global Women Leaders Committee Group
- Global Science, Technology and Innovation Committee Group
- Ethical Governance, Standards of Excellence and Quality Leadership Committee Group
- Europe Week Country Chairs Group
- Asia Week Country Chairs Group
- Africa Week Country Chairs Group
- Latin America Week Country Chairs Group
- North America Country Chairs Group
- MENA Country Chairs Group
- Caribbean Country Chairs Group
- WBAF Business School Faculty Members
- Global Mentors

\*If you are a member of a WhatsApp group that was opened as an individual initiative of one of our members (for example, country-specific groups, region-specific groups, special interest groups, etc.), please note that these WhatsApp groups are not WBAF-operated or sanctioned. WBAF WhatsApp group policies therefore do not apply to such groups.

### ■ Why do we operate WhatsApp groups?

WBAF WhatsApp groups have five main goals: (1) shared learning, (2) better networking, (3) knowledge exchange, (4) faster communication, and (5) increased exposure.

### ■ How do we categorise messages?

We identify three main message streams for the groups: (1) business stream (2) social stream (3) internal stream.

### ■ Business Stream

This stream is for messages relevant to one of the following keywords: (1) angel investment (2) startups (3) SMEs (4) entrepreneurship (5) digital inclusion (6) finance (7) innovation (8) financial inclusion (9) gender equality (10) ethics (11) corporate governance (12) leadership (13) private equity (14) banking (15) wealth management (16) emerging technologies (17) smart cities (18) co-investment funds (19) family offices (20) public – private partnerships (21) crowdfunding (22) stock exchanges.

### ■ Social Stream

Please do not post social messages in the groups. Only the WBAF Administration will post social messages related to the following issues: (1) the celebration of global important days and (2) any important message which may be of interest and relevant to group members.

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- **Internal Stream**

Only authorized community members are allowed to share internal communication.

- **Main Rules**

There are five main rules for WBAF WhatsApp groups: (1) Please do not give feedback in the group to any kind of business, social or internal message. You may DM the relevant person/s instead. (2) Please do not market or promote any product, service, idea, or event. (3) Please do not share information about your personal activities. Use your own social media to promote your personal activities such as delivering a speech at an event, etc. (4) Please do not invite any group member to participate in an event as a moderator, speaker, panellist, jury member, etc. via the group. You may DM them instead. [Kindly note that WBAF is not a speaker agency.] (5) Please state your name and your country when you share a post in the group.

- **Double Messaging**

There are two kinds of WhatsApp messaging at WBAF: (1) WhatsApp Groups (2) WhatsApp Broadcasting. In case you do not want to see previous sharings from a WhatsApp group or direct messages, you can block the Direct Messaging feature to stop it.

- **If you have a doubt about your sharing...**

If you are not sure whether information you want to share is in line with the policies of the WBAF group or not, please check with Christina Mc Gimpsey before you post it: [Christina.McGimpsey@wbaforum.org](mailto:Christina.McGimpsey@wbaforum.org)

- **Consequences for non-adherence to the rules**

Any group member who fails to respect to these policies will be removed from the group after discussing the issue with him/her.

**IMPORTANT NOTE:** The conditions outlined in this document are only for the WBAF World Congress. Other WBAF events or summits will have different conditions because the organizational partners will be different. Relevant information will be made available prior to the event.

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