



PLANNED GIVING COUNCIL OF PALM BEACH COUNTY

Membership Application – 2021-2022

Council Membership \$250 - (Early Bird discount - \$225 if paid in full by July 15, 2021)

- Cost of attending all breakfast meetings
• Listing in our new website directory along with headshot picture (optional)

Gold Sponsorship \$1,000 – Best Value**

- Company logo as gold sponsor on website with click-through
• One (1) Council membership for sponsoring organization
• Designated sponsor for one event with opportunity to speak as event sponsor
• Company logo displayed as Gold Sponsor during opening networking at 8 events
• Collateral display at event registration table for designated sponsored event

**Please contact our Administrator for additional Sponsorship levels available

Please print or type and return with your check for \$250, or \$1,000 made payable to the Planned Giving Council of Palm Beach County. Payments by credit card may be made through our website (www.palmbeachplannedgiving.org) or click here. Please remember to submit this application along with either payment method. Please email your headshot if you wish your photo to appear on the website to Admin@PalmBeachPlannedGiving.org.

Name*: _____
Title / Profession: _____
Firm / Business: _____
Address: _____
City / State / Zip: _____
Phone: _____ E-mail: _____

PLEASE NOTE: MEETING NOTICES WILL BE SENT TO YOUR E-MAIL ADDRESS

*Membership in the Planned Giving Council of Palm Beach County is on an individual basis and is not transferable to other individuals within the same organization. Annual dues of \$250 are for membership in this local Council only; membership in the National Association of Charitable Gift Planners, Inc. (formerly Partnership for Philanthropic Planning) is an additional amount for local council members. For further NACGP membership information, please visit their website: www.charitablegiftplanners.org.

Please check the professional affiliation of individual member and/or employer:

- Florida Bar;
□ Florida Institute of Certified Public Accountants or the American Institute of Certified Public Accountants;
□ Trust Officer/ Trust Representative of a Trust Company/Bank maintaining Trust Departments in the State of Florida;
□ Life Insurance Agent who is a member of the National Association of Insurance or Financial Advisor licensed in the State of Florida;
□ Financial Advisor who is licensed in the State of Florida and with FINRA, or a CFP in good standing;
□ Licensed Realtor;
□ Fundraising Representative or Business Development Officer with an organization described under Section 501(c)(3) of the Internal Revenue Code and, if required, registered with the State of Florida.
□ Other _____

Signature of Applicant

Date

Please return this form with your check to:
Planned Giving Council of PBC
Attn: Sherry Schattie
6671 W. Indiantown Rd., #50-194
Jupiter, FL 33458
If you have any questions, please email: Admin@PalmBeachPlannedGiving.org

PLEASE ATTACH YOUR BUSINESS CARD