

PLANNED GIVING COUNCIL OF PALM BEACH COUNTY

Membership Application – 2023-2024

Council Membership \$275

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

Organizational Membership \$600 (***Great value for organizations with multi-members*)

- Rotating membership for up to three (3) members in a single organization
- Cost of 1 organizational member to attend all breakfast meetings
- Listing of all organizational members in our website directory along with headshot picture (*optional*)

Gold Sponsorship \$1,500 (***Best Value – Includes organizational membership*)

- Company logo as gold sponsor on website with click-through
- Rotating membership for up to three (3) Council members from sponsoring organization
- Cost of 1 organizational member to attend all breakfast meetings
- Designated sponsor for one event with opportunity to speak as event sponsor
- Company logo displayed as Gold Sponsor during opening networking at all 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 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

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