

## PLANNED GIVING COUNCIL OF PALM BEACH COUNTY

### Membership Application – 2017-2018

#### Council Membership \$250

- 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 re-designed 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](http://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](mailto: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 \$150 for local council members. For further NACGP membership information, please visit their website: [www.charitablegiftplanners.org](http://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](mailto:Admin@PalmBeachPlannedGiving.org)

***PLEASE ATTACH YOUR  
BUSINESS CARD***