



## 2017 Meeting and Premier Sponsorships Form

PGRTOC is offering the opportunity for our company partners to sponsor six monthly breakfasts at the Santa Ana Country Club. Sponsorships include the opportunity to meet face-to-face with approximately 40 members and guests at these breakfast meetings.

| Premier Sponsorship   \$2500   | Annual Sponsorship   \$1000  | Breakfast Sponsorship   \$350   |
|--|--|---|
| <ul style="list-style-type: none"> <li>▪ Prominent listing on front page of monthly meeting e-vite</li> </ul>  | <ul style="list-style-type: none"> <li>▪ Prominent listing on front page of monthly meeting e-vite</li> </ul>  | <ul style="list-style-type: none"> <li>▪ Prominent listing on front page of monthly meeting e-vite</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Listing (logo and link) on PGRTOC website for 12 months</li> </ul>  | <ul style="list-style-type: none"> <li>▪ Listing (logo and link) on PGRTOC website for 6 months (incl. month of sponsorship and 2 months prior to and 3 months after)</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Listing (logo and link) on PGRTOC website for 3 months (incl. month of sponsorship, 1 month prior to and 1 month after)</li> </ul> |
| <ul style="list-style-type: none"> <li>▪ 6-ft draped display table in meeting room with opportunity to display marketing materials at each monthly meeting</li> </ul>                                      | <ul style="list-style-type: none"> <li>▪ 6-ft draped display table in meeting room with opportunity to display marketing materials at five monthly meetings (incl. month of sponsorship and 2 months prior to and 2 months after)</li> </ul> | <ul style="list-style-type: none"> <li>▪ 6-ft draped display table in meeting room with opportunity to display marketing materials during month sponsored</li> </ul>        |
| <ul style="list-style-type: none"> <li>▪ Opportunity to speak about your company program for 2 minutes at one breakfast meeting</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Opportunity to speak about your company program for 2 minutes at one breakfast meeting</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Opportunity to speak about your company program for 2 minutes at sponsored meeting</li> </ul>                                      |
| <ul style="list-style-type: none"> <li>▪ 20 complimentary breakfasts (Reservations required; to be used at one meeting or single reservations throughout the year –special promo code assigned)</li> </ul> | <ul style="list-style-type: none"> <li>▪ 10 complimentary breakfasts (Reservations required; to be used at one meeting or single reservations throughout the year – special promo code assigned)</li> </ul>                                  | <ul style="list-style-type: none"> <li>▪ One complimentary breakfast (others attending from your organization @ \$35 each; reservation required)</li> </ul>                 |

Yes, I would like to participate as a sponsor @  \$350 or  \$1000  \$2500

January 12  March 2  May 4  August 3  October 5  December 7

This Agreement is entered into on \_\_\_\_\_, 2016 / 2017 by and between the Planned Giving Round Table of Orange County (PGRTOC) and (Company): \_\_\_\_\_

Contact: \_\_\_\_\_

Billing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Signature of Contact: \_\_\_\_\_

Questions? Contact Gail James Clarke at PGRTOC • (866) 921-6440 or [gjmgmt@yahoo.com](mailto:gjmgmt@yahoo.com)

Mail completed form and check to:

Planned Giving Round Table of Orange County | 1442 E. Lincoln Avenue, PMB 441 | Orange, CA 92865



## ADVISORS IN ACTION

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An educational and membership-building initiative offered by the Planned Giving Round Table of Orange County (PGRTOC) that links socially-responsible advisors with charitable organizations that look to further their education in the area of planned giving. This initiative encourages professional advisors to identify, qualify and underwrite the annual PGRTOC membership fee for one or more Orange County based charitable organizations.

Though not mandatory, in addition to underwriting the cost of the annual membership fee (\$200), participating advisors are also encouraged to host the selected charity's representative at the monthly breakfast meetings throughout the year (\$35 per meeting).

**To qualify, participating advisors *must* be current members of the Planned Giving Round Table of Orange County.**

Benefits to the sponsoring professional advisor are:

1. Acknowledgement on the PGRTOC website as an "Advisor in Action".
2. Acknowledgement at a monthly breakfast meeting.
3. Satisfaction in helping an Orange County based charitable organization further their planned giving program.
4. Satisfaction in helping build the membership of the PGRTOC.

Benefits to the sponsored organization are:

1. Acknowledgement on the PGRTOC website as a new member.
2. Acknowledgement at a monthly breakfast meeting.
3. The annual membership cost being underwritten by a sponsoring advisor.
4. Ongoing educational and networking opportunities designed to help build the organizations planned giving program.

# ADVISORS IN ACTION

## Registration Form

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### Professional Advisor Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Profession:

- |                                       |  |   |
|---------------------------------------|--|---|
| <input type="checkbox"/> Attorney     | <input type="checkbox"/> Financial Advisor         | <input type="checkbox"/> Real Estate Broker |
| <input type="checkbox"/> CFP          | <input type="checkbox"/> Insurance Broker          |   |
| <input type="checkbox"/> CPA          | <input type="checkbox"/> Planned Giving Consultant |   |
| <input type="checkbox"/> Other: _____ |  |   |

### Sponsored Organization Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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Check Enclosed (\$200 made payable to: **Planned Giving Round Table of Orange County**)

Please bill my credit card:  American Express  MasterCard  Visa

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please mail, fax or email to: **(A completed PPP/PGRTOC Membership Application *must* accompany Advisor in Action Form).**

Planned Giving Round Table of Orange County  
1442 E. Lincoln Avenue, PMB 441  
Orange, CA 92865-1934

Ph: 866.921.6440  
Fax: 858.571-8503  
Email: gjmgt@yahoo.com



# Model Standards of Practice for the Charitable Gift Planner

## Preamble

The purpose of this statement is to encourage responsible gift planning by urging the adoption of the following Standards of Practice by all individuals who work in the charitable gift planning process, gift planning officers, fund raising consultants, attorneys, accountants, financial planners, life insurance agents and other financial services professionals (collectively referred to hereafter as "Gift Planners"), and by the institutions that these persons represent.

This statement recognizes that the solicitation, planning and administration of a charitable gift is a complex process involving philanthropic, personal, financial, and tax considerations, and often involves professionals from various disciplines whose goals should include working together to structure a gift that achieves a fair and proper balance between the interests of the donor and the purposes of the charitable institution.

## I. Primacy of Philanthropic Motivation

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

## II. Explanation of Tax Implications

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

## III. Full Disclosure

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

## IV. Compensation

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finder's fees, commissions or other fees by donee organization to an independent Gift Planner as a condition for the delivery of a gift is never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

## V. Competence and Professionalism

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

## VI. Consultation with Independent Advisers

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisers of the donor's choice.

## VII. Consultation with Charities

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planner, in order to insure that the gift will accomplish the donor's objectives, should encourage the donor early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planner shall endeavor, on behalf of the undisclosed donor, to obtain the charity's input in the gift planning process.

## VIII. Description and Representation of Gift

The Gift Planner shall make every effort to assure that the representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor's family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

## IX. Full Compliance

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

## X. Public Trust

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

*Adopted and subscribed to the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999. Reprinted with permission.*