

2019 Meeting and Premier Sponsorships Form

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

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

March 7 May 9 August 8 September 12 (Primer) October 10 December 5

This Agreement is entered into on _____, 2018 / 2019 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

Mail completed form and check to:

Planned Giving Round Table of Orange County | 1442 E. Lincoln Avenue, PMB 403 | Orange, CA 92865

Credit Card Authorization Form

Description of Item to be Charged:

Charge my credit card: American Express MasterCard Visa

Credit Card No: _____ Security Code: _____

Signature: _____ Expiration Date: _____

Name: _____

Company Name: _____ Telephone: _____

Email: _____

Billing Address, City, Zip _____

Contact the Council Office with any questions: (866) 921-6440.

ADVISORS IN ACTION

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

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: _____

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, ext. 5
Fax: 858.408-2671
Email: gjmgt@yahoo.com



Membership Application

Name _____
 Title _____
 Organization _____

 Address _____

 City _____ State _____
 Zip Code _____
 Phone _____
 E-mail _____

National Association of Charitable Gift Planners &
 Planned Giving Round Table of
 Orange County

(check all that apply)

National Membership Dues \$150

Council Dues \$200

If paying by check, please make check payable to

National Association of Charitable Gift Planners and mail to:
 National Association of Charitable Gift Planners
 233 McCrea Street, Suite 300
 Indianapolis, IN 46225

Interests (check as many as apply):

- Advocacy General CGP Education/Training Member Updates
 National Conference on Philanthropic Planning New Resources Research Volunteer Opportunities

How many years has your work included charitable gift/estate planning duties?

- 1-3 years 4-6 years 7-10 years 16-20 years 20+ years

Type of organization where you are currently employed (check all that apply):

- Academy/Private School Accounting Firm Arts/Cultural Organization Bank or Trust Company
 Brokerage Firm Community/Junior College Community Foundation/Trust Consulting Firm
 Continuing Care Facility/Community Hospital/Healthcare Environmental or Animal Welfare Group Financial Planning Institution
 International Aid/Education Law Firm Museum Insurance Company
 Small College Public Broadcasting Public University Private/Family Foundation
 Social Service Organization Symphony Religious Organization
 Technical School

Type of work (check all that apply):

- Accounting Annual Gifts Consulting Development
 Donor/Alumni Relations Estate or Trust Administration Executive Management Finance Management
 Gift Planning/Planned Giving Legal Counsel Philanthropic Advising Principal Gifts

How did you learn about CGP:

- Advertisement Another Association Colleague Email Employer Friend
 Local Council NCPP Conference Other Conference School

How would you categorize your current career stage? (please choose one)

- Getting Oriented Honing Skills Enhancing My Program Expanding Expertise

Are you a non-profit or for-profit professional?

Non-profit

For-profit

A membership for all points of your career.

- Grow your network and your career through the CGP Career Center and online member community CGP Link.
- Gain access to over 500 member-exclusive resources in the CGP Link library, including papers, model documents, and research. Connect to a network of more than 4,000 charitable gift planners in CGP Link through discussion forums including Gift-PL. Enjoy savings on exams and educational materials and attend NCPP at the CGP member rate.
- Take part in CGP advocacy efforts through member-exclusive virtual updates and conversations in CGP Link.
- Tap in demographic and salary data and research on the latest trends and best practices in charitable gift planning.

Thank you for your membership. To join please visit charitablegiftplanners.org/join. If you have any questions regarding membership, please contact us at **(317) 269-6274** or **membership@charitablegiftplanners.org**