

Dear Prospective Member:

Welcome and thank you for your interest in joining the **Planned Giving Round Table of Orange County**.

Our mission is to promote and increase philanthropy through planned giving by education, networking, public awareness and encouraging ethical practices. We serve the needs of charitable institutions, their representatives, and advisors working with philanthropic-minded clients by:

- Providing updated information on federal regulations and changing tax laws affecting charitable gifting;
- Facilitating communication and connection across our membership; and,
- Hosting networking events for members and other experts in the financial planning and development fields.

The PGRTOC Board looks forward to providing you and your colleagues the opportunity to learn and network with the top qualified leaders in the planned giving field at upcoming meetings and events. Please log into our website link to join immediately, or complete the attached application and email/fax/mail to the PGRTOC Council office with payment.

Thank you for your interest in joining the Planned Giving Round Table of Orange County, and please feel free to contact me with any questions.

Warmest Regards,



Susan Berkman

President, PGRT of Orange County

Ph: (562) 985-5122

Email: susan.berkman@csulb.edu

Mission Statement:

Promoting and increasing philanthropy through planned giving, by education, networking, public awareness and ethical practices.

planned giving round table

orange county



About Us:

Planned Giving Round Table of Orange County, PGRT-OC, is a non-profit organization serving the needs of charitable institutions and their representatives in the Orange County Community by:

- Facilitating communications to our members
- Hosting networking event for members and other experts in the financial planning and development fields.
- Providing updates on federal regulations and changing tax laws affecting charitable gifts

Our Mission:

To encourage the education and training of planned giving specialists, local fundraisers, and allied professionals. Members participate in seminars, conferences, presentations, research and publishing and similar activities in the study of gift planning.

Membership Benefits:

Membership in the PGRT-OC gives you access to a network of professionals which include certified public accountants, financial planners, non-profit development professionals and attorneys. Additionally, as a member, you are able to participate in informational meetings that will help you ensure that you fulfill the donor's philanthropic objectives as well as their long-range financial and personal objectives. Meeting topics range from marketing planned gifts to best practices.

"The Planned Giving Round Table of Orange County provided me a great forum to learn about the various ways we, as professionals, can help our clients to align their personal goals to achieve a greater impact in the community. The PGRT-OC is a wonderful place to learn and network with likeminded professionals-new and established in the community."

*Roland Ho, Senior Executive Director
Office of Planned Giving
University of California, Irvine*

"PGRT-OC keeps me connected with colleagues and updated on our profession to help me do the best for my organization."

*Devon Dougherty, CFRE
Chief Development Officer
Boy Scouts of America
Orange County Council*

"I enjoy the networking opportunity and the ability to interact with other professionals as to insights on current issues and potential solutions facing the charitable community. The PGRT-OC is a place of learning. I always take away at least one lesson that I can implement."

*Victoria Gray
Vice President / Senior Administrative Officer
Trust and Estate Services - Retired
Northern Trust*

"PGRT-OC helped me learn about planned giving. When I first joined, I was just out of law school and even with that background, much of what I heard was over my head. Over time, I began to understand the lingo (CRUT, CRAT, CLUT etc.) and can attribute my understanding directly to the educational opportunities afforded to me by the group."

*Susan Berkman
Assistant Vice President, Estate & Gift Planning
University Development
California State University, Long Beach*

MEMBERSHIP INFORMATION

Local Meetings

Reservations are necessary for all programs and must be pre-paid by check or credit card. Payment may be brought to the meeting. Non-members and guests may attend for an additional fee and first-time guests are complimentary.

- Regular breakfast meetings are held on the first Thursday of January, March, May, August, October and December.
- In September, we host an annual Planned Giving Primer.

Membership Options

1. **Local Membership Only: \$200** and are renewable on your anniversary.
2. **Local & National Membership: \$350** and are renewable on your anniversary. Fees include membership in the local Planned Giving Roundtable of Orange County Council, as well as the *National Association of Charitable Gift Planning*.

Local Membership Includes:

- Invitations to our exciting and informative meetings and networking events.
- A state-of-the-art *Web-site* with updated information and resources.
- Scholarship opportunities for PGRTOC members to attend the Western Regional Planned Giving Conference. (*Membership to PGRTOC is also available as a scholarship on a one-time basis per person.*)
- Access to excellence in the field through highly qualified speakers presented at the breakfast meetings, and the material they present.
- *Networking* opportunities with Orange County's finest gift planners, financial advisors, and consultants.
- Sponsorship of the "*Honored Charity*" program, which is designed to educate members of PGRTOC about the variety of services and programs provided by our local charities for the benefit of Orange County residents.
- Up-to-date information on *legislation* affecting the gift planning field.
- Notification of conferences, seminars and speakers of interest to the gift planning field.
- Access to the *PGRTOC Job Bank*. (*Listing on PGRTOC Web-site and available at monthly breakfast meetings.*)
- Meeting and event sponsorship opportunities. (*Opportunity for members to learn about the services you can provide.*)

Please see our website at www.pgrtoc.org for additional information.

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Combined Local & National Membership:

Includes all the benefits of local membership listed above, plus:

- Listing in the Partnership for Philanthropic Planning (PPP) annual *membership directory*.
- Annual subscription to *The Journal of Gift Planning*, award-winning educational tool.
- Participation in the PPP *National Conference on Planned Giving*, featuring top national speakers and topics of importance to professionals in the non-profit field.
- Connect with a Community of Pros: The National Association of Charitable Gift Planners is your professional home—a place to build your career and connect with a national network of charitable gift planning professionals.
- Education: We offer a wide range of educational opportunities—from our online resource library to webinars to in-person events—to help you keep your skills sharp.
- Research: Data at your fingertips. Keep tabs on our latest research.
- Standards: As a standard-setting organization, we provide these resources for all. Download models and best practices in PDF form.
- Our Position: CGP gives a voice to the charitable gift planning individuals in Washington.
- Join the Action: Participate in Member Advocacy Updates. Get the latest on policy and legislative activities in Congress.
- Read the Latest Scoop: Follow the blog for news and updates, about what you need to know from Washington.
- Important Legislative Update: Read up on the progress of the Charitable Rollover Legislation.

*Please see the national website at
www.charitablegiftplanners.org for additional information.*

Application

To join, please either complete the attached application and email/fax/mail to the PGRTOC Council office with payment, or go to www.pgrtoc.org/membership.html to enroll.

The PGRTOC Board looks forward to providing you and your colleagues the opportunity to learn and network with the top qualified leaders in the planned giving field at upcoming meetings and events.

**The PGRTOC Board of Directors would like to thank Jeff Gray and Ronald Blue & Co. for the Council's annual tax preparation.*

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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**