



NATIONAL ASSOCIATION of Charitable Gift Planners

Name:	
Title:	
Organization:	
Address:	
City/State/Zip:	
Phone:	
Fax:	
E-mail:	

MEMBERSHIP APPLICATION

National Association of Charitable Gift Planners -and/or- Charitable Gift Planners of SWFL

Full Membership Dues for both National & Local \$230.00

Local Council Dues Local Only \$50.00

(Check one of the boxes above) Form valid for new or renewing members through 9.30.22.

Interests (check as many as apply):

- | | | |
|---|--|--|
| <input type="checkbox"/> Advocacy | <input type="checkbox"/> Member Updates | <input type="checkbox"/> New Resources |
| <input type="checkbox"/> General CGP | <input type="checkbox"/> National Conference on Philanthropic Planning | <input type="checkbox"/> Research |
| <input type="checkbox"/> Education/Training | | <input type="checkbox"/> Volunteer Opportunities |

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

- | | | |
|------------------------------------|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> 1-3 years | <input type="checkbox"/> 7-10 years | <input type="checkbox"/> 16-20 years |
| <input type="checkbox"/> 4-6 years | <input type="checkbox"/> 11-15 years | <input type="checkbox"/> 20+ years |

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

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

Type of work (check all that apply):

- | | | | |
|---------------------------------------|--|---|---|
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Donor/Alumni Relations | <input type="checkbox"/> Executive Management | <input type="checkbox"/> Legal Counsel |
| <input type="checkbox"/> Annual Gifts | <input type="checkbox"/> Estate/Trust Administration | <input type="checkbox"/> Finance Management | <input type="checkbox"/> Philanthropic Advising |
| <input type="checkbox"/> Consulting | | <input type="checkbox"/> Gift Planning/Planned Giving | <input type="checkbox"/> Principal Gifts |
| <input type="checkbox"/> Development | | | |

How did you learn about CGP:

- | | | | |
|--|--|---|---------------------------------|
| <input type="checkbox"/> Advertisement | <input type="checkbox"/> NCPP Conference | <input type="checkbox"/> Employer | <input type="checkbox"/> Friend |
| <input type="checkbox"/> Another Association | <input type="checkbox"/> Colleague | <input type="checkbox"/> Other Conference | |
| <input type="checkbox"/> Local Council | <input type="checkbox"/> Email | <input type="checkbox"/> School | |

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

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Getting Oriented | <input type="checkbox"/> Honing Skills | <input type="checkbox"/> Enhancing My Program | <input type="checkbox"/> Expanding Expertise |
|---|--|---|--|

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

- | | |
|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Non-profit | <input type="checkbox"/> For-profit |
|-------------------------------------|-------------------------------------|

To join online, please visit charitablegiftplanners.org/join

If you have any questions regarding membership, please contact the National Association of Charitable Gift Planners at (317) 269-6274 or membership@charitablegiftplanners.org. If paying by check, make check payable to:

Please email info@charitablegiftplannersswfl.org with questions about local programs.

National Association of Charitable Gift Planners
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 Indianapolis, IN 46225