CHARITABLE GIFT PLANNERS of Southwest Florida

INFORM. INITIATE. IMPACT.

MEMBERSHIP APPLICATION

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

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

☐ Full Membership Dues for both National & Local $250.00

☐ Local Council Dues Local Only $100.00

(check one of the boxes above)

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
- ☐ 11-15 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
- ☐ Environmental or Animal Welfare Group
- ☐ Financial Planning Institution
- ☐ Hospital/Healthcare
- ☐ Insurance Company
- ☐ International Aid/Education
- ☐ Law Firm
- ☐ Museum
- ☐ Private/Family Foundation
- ☐ Public Broadcasting
- ☐ Public University
- ☐ Religious Organization
- ☐ Small College
- ☐ Social Service Organization
- ☐ Symphony
- ☐ Technical School

Type of work (check all that apply):

- ☐ Accounting
- ☐ Annual Gifts
- ☐ Consulting
- ☐ Development
- ☐ Donor/Alumni Relations
- ☐ Estate/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
- ☐ Local Council
- ☐ NCPP Conference
- ☐ Colleague
- ☐ Email
- ☐ Employer
- ☐ Other Conference
- ☐ School
- ☐ Friend

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

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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