



# 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 \$280.00

Local Council Dues Local Only \$100.00

*(Check one of the boxes above) Form valid for new or renewing members through 9.30.23.*

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

### 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](http://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](mailto:membership@charitablegiftplanners.org). If paying by check, make check payable to:

Please email [info@charitablegiftplannersswfl.org](mailto:info@charitablegiftplannersswfl.org) with questions about local programs.

**National Association of Charitable Gift Planners**  
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