

## **CGP Transfer Policy:**

### **Retaining National Association of Charitable Gift Planners Memberships between Individuals and Organizations**

National Association of Charitable Gift Planners (CGP) values our national members and the organizations that support them. We understand members change positions and organizations paying for memberships replace them with successors. Therefore, CGP has put forth a policy regarding retaining membership for both the individual member and the organization.

CGP allows transfer of individual memberships **before 90 days** of expiration date. CGP is an individual membership association and an active membership transfers with the individual if they leave an organization, even if the organization paid for the membership. At the time of expiration, the individual or the new organization is responsible for renewing the membership. CGP asks that the individual update their personal profile when changing employment positions.

The organization, which paid for the membership, has the opportunity to replace the membership with the successor of the exiting individual for the remaining term of the membership without an additional cost. At the time of expiration, the organization or individual is responsible for renewing the membership. CGP asks the new individual assuming the membership to contact the CGP office to establish their individual member profile.

If you have questions please contact Membership Data Manager, Carey Wilson, at [cwilson@charitablegiftplanners.org](mailto:cwilson@charitablegiftplanners.org).

Thank you