



## MEMBERSHIP APPLICATION

Planned Giving Round Table of Arizona  
 In care of: Premium Organization  
 PO Box 4130 Scottsdale, AZ 85261-4130  
 Ph: 602-840-2900 Fax: 480-922-5283  
 E-Mail: membership@PGRTAZ.org  
 Taxpayer ID Number: 77-0653171

Name: \_\_\_\_\_  
 Designation: CFP, CFRE, CPA, CLU, ChFC, JD  
 Title: \_\_\_\_\_  
 Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 FAX: \_\_\_\_\_  
 E-mail: \_\_\_\_\_

Date applied: \_\_\_\_\_

Planned Giving Round Table  
 of Arizona Chapter Dues\* \$ 125.00

Pre-Paid Meals\*\* \$ 220.00

**TOTAL ENCLOSED: \$125.00 or \$345.00**

*Please Circle Amount Enclosed*

Please retain a copy of this invoice for your records.  
 Make one check payable to PGRT of AZ and mail  
 the payment with an application to the address above.

Partnership for Philanthropic Planning  
 Membership Number: \_\_\_\_\_ (if applicable).

\*Membership in your local chapter includes invitation and reduced fees for the 5 Lunch and Learn planned giving course presentations, and the 5 Breakfast series advanced workshop programs, reduced admission to the Summer Forum, networking and job openings announcements, and inclusion in the local membership roster.

\*\* Pre-paid meal option includes 10 meals (a \$295 value) for \$220 (all program meals, **except** Summer Forum). Meal option is **IN ADDITION** to the membership fee of \$125.

You may choose to join at the national level (Partnership for Philanthropic Planning) only, the local chapter only, or both the national and the local chapter. Visit [www.PPPnet.org](http://www.PPPnet.org) for national membership information. Professionals engaged more than 3 years or at least 50% of their time in the pursuit of estate planning and planned giving are encouraged to join at both levels.

Membership in the Planned Giving Round Table of Arizona vests with the individual and is not transferable. There shall be no corporate or institutional memberships in the Planned Giving Round Table of Arizona.

Members are encouraged to adhere to the code of ethics outlined in the Model Standards of Practice for the Charitable Gift Planner, as adopted and subscribed to by the Partnership for Philanthropic Planning (formerly NCPG), as amended from time to time (see back of application).

Your level of involvement with the Round Table affects your satisfaction with programs, networking, and personal objectives for joining us. Please note below your interest, if any, in:

- Membership and Member communications committee.
- Programs: Lunch and Breakfast sessions.
- Summer Forum: Logistics and program planning.
- Leave a Legacy: Liaison or active on LAL committees.
- Governance: Board membership and leadership.
- Legislative Look Out: watching the environment we work in.

## **I. PRIMACY OF PHILANTHROPIC MOTIVATION**

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

## **II. EXPLANATION OF TAX IMPLICATIONS**

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

## **III. FULL DISCLOSURE**

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

## **IV. COMPENSATION**

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finders fees, commissions or other fees by a donee organization to an independent Gift Planner as a condition for the delivery of a gift are never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

## **V. COMPETENCE AND PROFESSIONALISM**

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

## **VI. CONSULTATION WITH INDEPENDENT ADVISORS**

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisers of the donor's choice.

## **VII. CONSULTATION WITH CHARITIES**

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planners, in order to insure that the gift will accomplish the donor's objectives, should encourage the donor, early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planners shall endeavor, on behalf of the undisclosed donor, to obtain the charity's input in the gift planning process.

## **VIII. DESCRIPTION AND REPRESENTATION OF GIFT**

The Gift Planner shall make every effort to assure that the donor receives a full description and an accurate representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor's family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

## **IX. FULL COMPLIANCE**

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

## **X. PUBLIC TRUST**

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

Adopted and subscribed to by the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999.