



## ADVISORS IN ACTION

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A new, educational and membership-building initiative offered by the Partnership for Philanthropic Planning Orange County that links socially-responsible advisors with charitable organizations that look to further their education in the area of planned giving. This initiative encourages professional advisors to identify, qualify and underwrite the annual PPPOC membership fee for one or more Orange County based charitable organizations.

Though not mandatory, in addition to underwriting the cost of the annual membership fee (\$125), participating advisors are also encouraged to host the selected charity's representative at the monthly breakfast meetings throughout the year (\$25 per meeting).

**To qualify, participating advisors *must* be current members of the Partnership for Philanthropic Planning Orange County.**

Benefits to the sponsoring professional advisor are:

1. Acknowledgement on the PPPOC website as an "Advisor in Action".
2. Acknowledgement at a monthly breakfast meeting.
3. Satisfaction in helping an Orange County based charitable organization further their planned giving program.
4. Satisfaction in helping build the membership of the PPPOC.

Benefits to the sponsored organization are:

1. Acknowledgement on the PPPOC website as a new member.
2. Acknowledgement at a monthly breakfast meeting.
3. The annual membership cost being underwritten by a sponsoring advisor.
4. Ongoing educational and networking opportunities designed to help build the organizations planned giving program.

# ADVISORS IN ACTION

## Registration Form

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### Professional Advisor Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Profession:

- |                                       |  |   |
|---------------------------------------|--|---|
| <input type="checkbox"/> Attorney     | <input type="checkbox"/> Financial Advisor         | <input type="checkbox"/> Real Estate Broker |
| <input type="checkbox"/> CFP          | <input type="checkbox"/> Insurance Broker          |   |
| <input type="checkbox"/> CPA          | <input type="checkbox"/> Planned Giving Consultant |   |
| <input type="checkbox"/> Other: _____ |  |   |

### Sponsored Organization Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Email: \_\_\_\_\_

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Check Enclosed (\$125 made payable to: **Partnership for Philanthropic Planning**)

Please bill my credit card:  American Express  MasterCard  Visa

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

*Please mail or fax to:*

Partnership for Philanthropic Planning Orange County  
1442 E. Lincoln Avenue, PMB 441  
Orange, CA 92865-1934

Ph: 866.921.6440  
Fax: 866.921.6443  
Email: gjmgmt@yahoo.com