

Advisor Member Application

ORGANIZATIONAL INFORMATION

Name of organization _____

ADDRESS CITY STATE ZIP

PHONE WEBSITE

ORGANIZATIONAL FACEBOOK PROFILE TWITTER HANDLE

INDIVIDUAL ADVISOR INFORMATION

Lead contact for this Membership: _____

TITLE EMAIL PHONE

FACEBOOK PROFILE TWITTER HANDLE LINKEDIN URL

For each additional advisor from your organization who is applying for Membership, please attach their name, title, email, phone, and social media information on a separate sheet.

Business focus area

(chose as many as apply to your current work)

- | | |
|---|---|
| <input type="checkbox"/> Law | <input type="checkbox"/> Evaluation consultant |
| <input type="checkbox"/> Certified financial planning | <input type="checkbox"/> Marketing or communications consultant |
| <input type="checkbox"/> Accounting | <input type="checkbox"/> Strategic planning consultant |
| <input type="checkbox"/> Bank trust services | <input type="checkbox"/> Executive search services |
| <input type="checkbox"/> CLU/insurance services | <input type="checkbox"/> Board development |
| <input type="checkbox"/> Financial planning | <input type="checkbox"/> Other type of business focus to grantmakers, donors, or operating nonprofits |
| <input type="checkbox"/> Philanthropy advisor | |
| <input type="checkbox"/> Estate planning | |
| <input type="checkbox"/> Fundraising consultant | |

Type of clientele

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Foundations | <input type="checkbox"/> Families |
| <input type="checkbox"/> Trusts | <input type="checkbox"/> Operating nonprofits |
| <input type="checkbox"/> Individuals | |

Briefly describe how Donors Forum can help you better serve your clientele.

Dues

Advisors located outside the metro-Chicago area of Cook, DuPage, Kane, Lake, and Will counties receive a 50% discount.

- | | |
|---|---------|
| 1 individual from an organization | \$500 |
| <input type="checkbox"/> My organization also belongs to the Association of Consultants to Nonprofits (20% discount) | \$400 |
| 2 - 5 individuals from an organization | \$1,000 |
| <input type="checkbox"/> Our organization also belongs to the Association of Consultants to Nonprofits (20% discount) | \$800 |
| 6-10 individuals from an organization | \$1,500 |
| 11 or more individuals from an organization | \$2,500 |

DUES PAYMENT

- Our check in the amount of \$ _____, made payable to Donors Forum, is enclosed.
- Please charge our credit card \$ _____
- Visa Discover Card MasterCard AmEx

CARD NUMBER EXPIRATION DATE

PRINT NAME ON CARD

SIGNATURE

Please submit your application and along with a client list or brochure, to Donors Forum, 208 S. LaSalle St., Suite 1540, Chicago, Ill. 60604; or scan and email to join@donorsforum.org.

Advisors to individuals and philanthropies also agree to abide by **Donors Forum's Professional Advisors' Statement of Ethics and Best Practices** on the next page.

Please sign the statement and return it with your application

Questions? Email join@donorsforum.org.



Donors Forum's Professional Advisors' Statement of Ethics and Best Practices

Each Advisor Member who works with individuals or philanthropies should return a signed copy to Donors Forum to indicate that they agree with and subscribe to the principles and will strive to adopt the best practices.

Donors Forum's Advisor Members are dedicated to promoting the highest standards of competence and ethics in their practice. Those who serve individuals and philanthropies (including legal, financial, and tax consultants; wealth advisors; philanthropic consultants; and trust officers) focus on their clients' philanthropic goals and the implementation of those goals. They are dedicated to deepening collegial relationships to support effective giving and to help clients achieve their giving potential by inspiring and enhancing the leadership and capacity of grantmakers. These Advisor Members help clients serve the public good in alignment with clients' vision, ideals, and mission.

Advisor Members who serve individuals and philanthropies will:

Advance best practices in philanthropy including its governance and administration, for example, by promoting *Illinois Nonprofit Principles and Best Practices*.

Subscribe to the highest level of ethical practice. Disclose conflicts of interest and personal biases and not allow them to influence work with clients. Place clients' best interests above their own direct or indirect interests.

Provide advice that is compliant with the applicable charitable and philanthropic laws and regulations, assuring sound advice and counsel and making appropriate referrals to expert guidance.

Practice at the highest levels of competence. Continue to build on expertise, stay current in knowledge base, improve skills, and help clients build their philanthropic capacity.

Maintain clients' confidentiality for all business and personal information that is not in the public domain.

Share knowledge and experience to strengthen the field through leadership in peer learning.

SIGNATURE:

DATE: