



**Member Application
2009**

Name: _____

Organization: _____

Title: _____

Address: _____

Address: _____

City, ST, Zip: _____

Phone: _____

Cellular: _____

Fax: _____

E-mail: _____

**Partnership for Philanthropic Planning of
Miami-Dade County**

Annual membership dues are for a 12 month period. Renewals are due and payable on the membership anniversary date.

Local Membership

<input type="checkbox"/> Charitable Organization <i>single</i>	\$100.00
any <u>one</u> person from organization can attend any regular meeting; guest fee \$25.00 per person	
<input type="checkbox"/> Charitable Organization <i>group</i>	\$350.00
<u>unlimited</u> number of persons from organization can attend any regular meeting; no guest fees	
<input type="checkbox"/> Individual Membership	\$100.00
guest fee \$25.00 per person	

***Please make check payable to
Planned Giving Council of Miami-Dade County
and send along with application to:***

**Partnership for Philanthropic Planning of
Miami-Dade County
c/o Miami Children's Hospital Foundation
Attn: Meschelle Huether
3000 SW 62nd Avenue
Miami, FL 33155**

Staff Use Only ID# _____

Check# _____

Amount _____

The Partnership for Philanthropic Planning of Miami-Dade County is a member of the National Partnership for Philanthropic Planning (www.PPPnet.org), the parent organization to more than 100 local planned giving councils across the country. PPP's programs & services, including the *Journal of Gift Planning*, are provided as a benefit of your national membership. Many other benefits accrue to you as a national member, including job listings, representation before federal agencies and Congress, research papers, etc.

Demographic Data: please check *one* of the following options to indicate your *primary* employer:

- | | |
|---|---|
| <input type="checkbox"/> Educational Institution | <input type="checkbox"/> Financial Planning Practice/Firm |
| <input type="checkbox"/> Hospital/Health Care Org. | <input type="checkbox"/> Insurance Company/Firm |
| <input type="checkbox"/> Religious Organization | <input type="checkbox"/> Accounting Practice/Firm |
| <input type="checkbox"/> Social Service Organization | <input type="checkbox"/> Law Practice/Firm |
| <input type="checkbox"/> Environmental Organization | <input type="checkbox"/> Consulting Practice/Firm |
| <input type="checkbox"/> Arts Organization | <input type="checkbox"/> Bank or Trust Company |
| <input type="checkbox"/> Community Foundation | <input type="checkbox"/> Brokerage Firm |
| <input type="checkbox"/> Other Nonprofit Organization | <input type="checkbox"/> Other For-profit Business |

In what year did you begin working as a gift planner? _____

Is your employer a sponsor of the American Council on Gift Annuities? Yes ___ No ___

Are you a member of more than one PPP-affiliated council? Yes ___ No ___

If so, which council(s)? _____



Member Application 2009

Purpose

The Partnership for Philanthropic Planning of Miami-Dade County is a not-for-profit corporation established to provide training, education, information and other benefits to facilitate the professionalism and success of persons giving advice regarding the use of charitable planned giving for the ultimate benefit of the community.

Our mission is to:

- *Provide opportunities for members and other participants to increase and improve their skills and knowledge regarding charitable planned giving through regular meetings seminars and other programs.*
- *Cooperate and support joint meetings with organizations and professional groups in related fields.*
- *Foster networking between professionals in related fields and charitable institutions, through meetings, programs and written communications.*
- *Support and expand our Leave A Legacy Program*

An Informal History of LEAVE A LEGACY® of Miami-Dade County

LEAVE A LEGACY® started as an initiative of the Columbus Planned Giving Council, a member of the National Partnership for Philanthropic Planning. Each local chapter of PPP, including the Partnership for Philanthropic Planning of Miami-Dade County, is a nonprofit organization comprised of planned giving officers, other nonprofit development officers, and other "allied professionals" such as CPAs, CLUs, CFPs, trust officers and of course, attorneys who share the goal of promoting planned giving.

The Partnership for Philanthropic Planning of Miami-Dade County hosts monthly meeting at which experts address various legal, financial, ethical, developmental and other aspects of planned giving. We also disseminate information to the nonprofit community and general public.

The LEAVE A LEGACY® initiative is a great example of something developed at the "grassroots" level which caught on and spread like (pick your metaphor: wildfire, mushrooms, acne, etc.) crazy, and which benefits everyone and hurts no one. The idea is to:

- help nonprofit organizations implement planned giving programs and spread the word about philanthropy ("**Turning donors into benefactors**")
- educate professional advisors about planned giving and philanthropy ("**Making the ask; getting clients to do the right thing**")
- promote planned giving and philanthropy to the general public ("**Everyone can be a philanthropist**")

LEAVE A LEGACY® accomplishes its mission by encouraging members of the general public to establish charitable gifts through their estate plans. The LEAVE A LEGACY® message is delivered through a multi-year public awareness campaign, implemented in local communities by a collaborative effort of fundraisers, donor advisors, charities and funders.