



Strengthening Philanthropy in the Mountain State

Professional Advisors & Philanthropic Consultants Membership

Join Philanthropy West Virginia as a Professional Advisor & Philanthropic Consultant and connect with our statewide network of individuals, foundations, corporate giving programs and organizations actively involved in grantmaking and philanthropy throughout West Virginia.

ELIGIBILITY

Businesses eligible to be Professional Advisor & Philanthropic Consultants cannot be grantmaking organizations, but are providing services or products to philanthropic/grantmaking organizations, such as:

- Accounting & Auditing
- Legal
- Information Technology (IT) and/or Software
- Investment, Financial Advising, and Trust Departments
- Insurance
- Consulting & Training Services

WHAT WE OFFER PROFESSIONAL ADVISORS & PHILANTHROPIC CONSULTANTS:

- Invitation to members-only programs and events
- Opportunity to submit articles for print and digital publications (expertise based)
- MCLE, CPE, and other CEU approved Trainings
- Free job postings on Career Page
- Subscription to quarterly news and e-publications
- First invitation to be Program Sponsorships & Exhibitors
- Reduced sponsorship opportunities for digital communication and web-based resources

Pricing:

- Single-person firm: \$ 600
- For each additional, 2 or 3 individuals: \$ 350
- Firms of 4 or more: \$1,500

(10% discount if corporate foundation is IPA member)



If you have questions, contact Philanthropy WV staff by calling 304.517.1450 or emailing: paul@philanthropywv.org You can become a member by completing the application on the back of this form.

Professional Advisors & Philanthropic Consultants Membership Application



Advisor or Consultant Company's Name: _____

Contact(s): _____ Title: _____

Mailing Address: _____

Telephone: _____ Website: _____

Email address(es): _____

Company's Facebook Profile Name: _____

Company's Twitter Handle: _____

Type of Professional Advisor or Philanthropic Consultant:

- | | | |
|--|---|--|
| <input type="checkbox"/> Attorney | <input type="checkbox"/> CPA/Accountant | <input type="checkbox"/> IT/Software |
| <input type="checkbox"/> Bank Trust Officer | <input type="checkbox"/> Financial Advising | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Certified Financial Planner | <input type="checkbox"/> Consulting | <input type="checkbox"/> Training Services |
| <input type="checkbox"/> Grantmaker/Foundation Search Services | | <input type="checkbox"/> Other (please describe) |

Types of clientele: Grantmaking Foundations Trusts Individuals Families
 Other (please describe): _____

Conditions of Membership: Professional Advisor & Philanthropic Consultant Membership in Philanthropy West Virginia indicates your willingness and commitment to:

- *Subscribe to the highest standards of competence and ethical practice*
- *Advance clients' philanthropic goals in accordance with applicable charitable and philanthropic laws and regulations*
- *Share knowledge and experience "Strengthening Philanthropy in the Mountain State" (Philanthropy WV's mission)*
- *Agree not to use membership to solicit business*

Disclaimer: Philanthropy West Virginia retains final discretion on all matters concerning membership approval and status.

Signature: _____

Date: _____