

**2017 PHILANTHROPY NETWORK
WEALTH ADVISOR/FAMILY OFFICE MEMBERSHIP APPLICATION**

Thank you for your interest in joining Philanthropy Network. Please return your completed membership application to Theresa Jackson, Director of Member Services and Information at theresa@philanthropynetwork.org or by mail to the following address:

**Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402
Philadelphia, PA 19102**

1. Contact Information:

Company Name _____

How would you like to be listed on Philanthropy Network's membership roster? *(if different than above)*

Name/Title of Contact Person _____

Mailing Address _____

Phone _____ Fax _____

Email _____ Website *(if applicable)* _____

County location _____

2. Member Type:

Please indicate the type of services/area of expertise you and/or your organization provides to the philanthropic sector (e.g. foundations, trusts, donor advised fund holders, individual investors).

Provider of Wealth and/or Investment Advisory Services

Family Office

Other (Please describe): _____

3. Assets Under Management:

Please indicate the amount of assets under management by your organization in the Greater Philadelphia Region:

\$ _____

Of this amount, please indicate how much is available for philanthropic giving: \$ _____

4. Membership Dues:

Annual membership dues are \$2000 for firms providing investment/wealth advisory services and family offices. This fee includes membership access for up to five (5) individuals within your organization. Membership also includes guest privileges at Network events for selected clients. For an additional fee of \$500, you may receive access for up to five (5) additional employees within your organization. Please indicate the level of dues for your organization:

\$ _____

Please see reverse for several additional questions aimed at helping us to best serve your needs.

Please take a few moments to answer these questions that will help us better understand the nature of your work and address your interests. Attach additional sheets as necessary.

1. Please explain how your work connects with philanthropy. Describe the nature of the services you provide to clients engaged in philanthropy. Please be as specific as possible.

2. How many philanthropy-related (i.e. donor) clients do you currently represent in the Greater Philadelphia region? What types of clients are they? If you are able, please provide the names of several sample clients.

3. Please share your interest(s) in joining Philanthropy Network Greater Philadelphia. In what ways can Philanthropy Network be a benefit to your organization's work (e.g., information resource for clients, learning new skills, connecting with peers, etc.)? What can you contribute as a member of our Network?

4. How did you learn about Philanthropy Network Greater Philadelphia?

Referred by a current member (please provide member name):

Contacted by Philanthropy Network staff

Attended a past Philanthropy Network event

Read about Philanthropy Network in the news or elsewhere

Other _____

5. Giving Priorities: Please indicate issue areas of interest for your clients engaged in philanthropy.

Arts & Culture

Community/Economic Development

Education

Environment

Food & Nutrition

Health

Human/Social Services

Women & Girls

Other (please specify):

6. Geographic Reach: Please indicate those geographic areas in which your clients provide funding:

Bucks County, PA

Chester County, PA

Delaware County, PA

Montgomery County, PA

Philadelphia County, PA

Statewide

Tri-State Region (PA, NJ, DE)

Nationwide

International

Other (please specify):

7. Additional Staff: Please attach a list of additional individuals from your organization that will to participate in and receive information about Philanthropy Network activities. Please include the following information for staff member listed:

- Name and title
- Email and mailing addresses
- Phone

Thank you for your interest in Philanthropy Network Greater Philadelphia.
A Philanthropy Network staff member will be in touch with you upon receipt of your completed application form.