

Professional Advisor Network Application

Please email or fax this completed form and direct any inquiries to:

John L. Brown, Executive Director
 Email: jlbrown@sdhdf.org
 Phone: (619) 291-3383 Fax: (619) 291-3384
 San Diego Human Dignity Foundation
 P.O. Box 33245, San Diego, CA 92163-3245
www.myLGBTfoundation.org

1. Contact Information

First Name		Last Name	
Suffix (e.g., Esq., CPA)		Title	
Company			
Address Line 1			
Address Line 2			
City		Zip Code	
Business Phone		Alternate Phone	
E-Mail Address		Company URL	

2. Practice Area

Please check all that apply and provide license types/numbers if applicable.

<input type="checkbox"/> Attorney – Estate Planning	State Bar #:
<input type="checkbox"/> Attorney – Tax	State Bar #:
<input type="checkbox"/> Attorney – Adoption & Family Law	State Bar #:
<input type="checkbox"/> Tax – Certified Public Accountant	License #:
<input type="checkbox"/> Tax – Enrolled Agent	License #:
<input type="checkbox"/> Finance – Financial Advisor	License #:
<input type="checkbox"/> Finance – Registered Investment Advisor	Registration #:
<input type="checkbox"/> Finance – Certified Financial Planner	License #:
<input type="checkbox"/> Conservator/Fiduciary	License #:
<input type="checkbox"/> Insurance – Broker/Agent	License #:
<input type="checkbox"/> Real Estate – Broker/Agent	License #:
<input type="checkbox"/> Other – Please Specify:	

3. Description of Services

Please provide a one sentence description of your services for posting on our website.

The information in Sections 4 - 7 below is for our files only and will not be published or disseminated without your prior approval.

4. Professional Qualifications

Please list any relevant professional licenses, certifications, and degrees.

5. LGBT Expertise

Please describe how extensively you have served lesbian, gay, bisexual or transgendered (LGBT) clients.

6. Fee Structure and/or Minimums

If a brief description is not possible, feel free to leave this blank.

7. Practice Differentiators

Please add anything that you believe distinguishes your practice.

Our Policy

San Diego Human Dignity Foundation (SDHDF) is dedicated to promoting responsible philanthropy in San Diego's LGBT community. Our research shows that LGBT people do not support LGBT charities at the same levels as the non-LGBT community supports mainstream ones. We have a long way to go to reach our potential as philanthropists. We know that donors who are looking for professional services also care about this issue. Accordingly, we will provide special recognition to those members of our Professional Advisor Network who demonstrate leadership by contributing their time, talent or financial resources to San Diego's LGBT community (continued on next page).

If you perform any of the leadership roles described below, San Diego Human Dignity Foundation will highlight your name in all caps in our membership listing, designating you as an "LGBT Community Leader." Community leadership activities are not a requirement of membership.

8. LGBT Leadership Roles

Please check all that apply.

<input type="checkbox"/>	I am a member/want to be a member of SDHDF's Foundation Club at the \$100/month level (\$1,200/year).
<input type="checkbox"/>	I provide/will provide equivalent financial support to other SDHDF events. If so, which one(s):
<input type="checkbox"/>	I currently serve on the board of directors of a local LGBT organization or organizations. If so, which one(s):
<input type="checkbox"/>	I devote significant volunteer time to one or more other local LGBT organizations. If so, which one(s):
<input type="checkbox"/>	I have referred one or more clients to San Diego Human Dignity Foundation for a planned gift. If authorized to reveal, tell us who:

Just One More Thing...

<p>We encourage members of SDHDF's Professional Advisor Network to join The Greater San Diego Business Association, our gay and lesbian Chamber of Congress. GSDBA can be reached at (619) 296-4543 or www.gsdba.org. If you are already a member, please check the box below and we will acknowledge this in our membership listing.</p> <p><input type="checkbox"/> I am a member of GSDBA</p>

9. Membership Terms and Agreement

I believe in the mission of San Diego Human Dignity Foundation (SDHDF). I certify that the information I have provided herein is true and complete to the best of my knowledge and belief. I authorize SDHDF to verify and publish the information provided in Sections 1, 2, and 3, and to verify the information provided in Section 8. I release SDHDF from any liability in connection therewith. I understand that providing false or misleading information in this application shall be grounds for denial of membership, and that SDHDF may cancel my membership at any time.

By checking this box, I agree to the terms above:	<input type="checkbox"/>
Date:	

Thank you for your interest. You will be notified upon acceptance to SDHDF's Professional Advisor Network.

Privacy is a concern to all of us! SDHDF will never share, sell, or rent individual personal information with anyone without your advance permission or unless ordered by a court of law.