



Join the Professional Advisors Group!

I wish to join the Professional Advisors Group of The Catholic Foundation. I understand the objectives of this group include:

- To provide members with a greater understanding of the role of The Catholic Foundation
- To provide venues where professionals receive pertinent educational and networking opportunities
- To offer professional expertise to individuals who are considering a charitable gift
- To support educational efforts regarding estate and gift planning throughout the Diocese of Columbus

As a member, I understand that my role includes:

- To work with sub-committees to plan and implement the objectives of the group
- To serve as a resource to donors, parishes, constituent organizations and Foundation staff
- To participate in quarterly meetings and the Annual John L. Sauter Estate Planning Seminar

Contact Information

Name _____

Business _____ Title _____

Address _____ City/State/Zip _____

Phone _____ Fax _____

Email _____

Professional Information

I am engaged in one of the following professions and am involved in the financial/estate planning field:

- Accountant Attorney Financial Advisor Insurance Consultant Trust Officer

If my profession requires licensing or certification, I hereby certify that I am duly licensed/certified by the governing body of my profession.

Associations _____

Special Achievements _____

Interests _____

Parish/Church/House of Worship: _____

Membership Level: Regular Member (No Dues) Sustaining Member (\$100, complete below)

Sustaining Member Dues (\$100): Check enclosed Bill my credit card (Visa/MC/Discover) Invoice me

Credit Card Type _____ 16-Digit Card # _____

Expiration Date _____ Name on Card _____

Billing Address _____

Authorization Signature _____ Date _____

Please mail, email or fax this form to: The Catholic Foundation, Attn: James Anzelmo,
257 East Broad Street, Columbus, Ohio 43215
JAnzelmo@catholic-foundation.org, Phone: 614-443-8893 Fax: 614-443-8894