



THE CATHOLIC FOUNDATION'S
Professional Advisors Group

PROFESSIONAL ADVISORS GROUP MEMBERSHIP FORM

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 impact by The Catholic Foundation
- Opportunities to learn pertinent educational topics 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
- Growth in faith stewardship

As a member, I understand that my role includes:

- To serve as a resource to donors, parishes, constituent organizations and Foundation staff
- To participate in quarterly educational series and quarterly networking events and
- To participate in 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 Funeral Director

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 send this form to: The Catholic Foundation | Attention: PAG Membership

Mail: 257 East Broad Street | Columbus, OH 43215 | Email: info@catholic-foundation.org | Fax #: 614-443-8894

