



Colorado Planned Giving Roundtable
 PO Box 101208
 Denver CO 80250-1208
 (303)544-2301
 www.cpgr.org

MEMBERSHIP APPLICATION

Mr Mrs Ms Dr

NAME _____
 TITLE _____
 ORGANIZATION _____
 E-MAIL _____
 ADDRESS _____

 CITY/STATE/ZIP _____
 PHONE _____
 FAX _____
 CELL PHONE _____

Yearly renewal fee: \$75

Additional tax-deductible donation to CPGR: _____

Method of payment:

Check Mastercard Visa

For charge information only:
 Account # _____
 Expiration date _____
 Signature _____

IMPORTANT NOTE: *Make check payable to Colorado Planned Giving Roundtable and return to CPGR with the renewal form. Please retain a copy for your records.*

Age Range: 20-30 31-40 41-50
 51-60 61-70 70+

Sex: Male Female

Professional Designation – I am a: CFP CPA

Estate Planning Attorney Trust Officer
 Insurance Agent Stock Broker
 Planned Gifts Officer Major Gifts Ofcr
 Development Officer Executive Director
 Other _____

CPGR Staff Use Only ID# _____ Date _____

Amt _____ Ck # _____

Auth # _____ Ref # _____

Would you like to learn about volunteer opportunities with the Colorado Planned Giving Roundtable? Please indicate areas of interest to you:

Board Committee

Marketing Summer Symposium
 Membership Government Relations
 Finance Resource Center
 Sponsorship LEAVE A LEGACY®
 Programs

With which organizations are you affiliated?

National Committee on Planned Giving
 AFP
 Estate Planning Council (please specify) _____
 Other _____

Demographic Data: please check ONE of the following options to indicate your PRIMARY employer:

<input type="checkbox"/> Educational Institution	<input type="checkbox"/> Financial Planning Practice/Firm
<input type="checkbox"/> Hospital/Health Care Org.	<input type="checkbox"/> Insurance Company/Firm
<input type="checkbox"/> Religious Organization	<input type="checkbox"/> Accounting Practice/Firm
<input type="checkbox"/> Social Service Organization	<input type="checkbox"/> Law Practice/Firm
<input type="checkbox"/> Environmental Organization	<input type="checkbox"/> Consulting Practice/Firm
<input type="checkbox"/> Arts Organization	<input type="checkbox"/> Bank or Trust Company
<input type="checkbox"/> Community Foundation	<input type="checkbox"/> Brokerage Firm
<input type="checkbox"/> Other Nonprofit Organization	<input type="checkbox"/> Other For-profit Business