



JOIN THE PREFERRED ADVISORS GROUP

The Preferred Professional Advisors Group (PAG) is a great resource to find an estate planning lawyer, financial planner, insurance professional, accountant or trust officer. Professionals in these fields are invited to become members of the Foundation’s PAG. Members share their expertise with fellow professional advisors on how to integrate philanthropy into conversations with Catholic clients.

The Group also advises the Foundation about the changing needs of professional advisors and helps broaden the circle of advisors who recommend the Foundation to their clients. All members are invited to attend quarterly meetings with other professionals, receive our e-newsletter, and be recognized in the Foundation’s annual report.

I wish to join the Preferred Advisors Group of the Catholic Foundation of Michigan.

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 support educational efforts regarding estate and gift planning throughout the Archdiocese of Detroit

Contact Information

Name _____

Business _____ Title _____

Address _____ City/State/Zip _____

Phone _____ 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 Catholic Funeral Planner
- 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 Levels:

- **Basic:** access to additional web content on how donors can connect with the CFM (\$100/year)
 - **Premier:** your contact info will be listed on website; invitation to a semi-annual professional event; invitation to provide guidance to the CFM in approaching donors (advisory council) (\$250/year)
 - **Exclusive:** your contact info and picture on website; above invitations plus an opportunity to speak at a professional, parish, or nonprofit event; exclusive access to an event with the CFM's board (\$500/year)
- Basic (\$100) Premier (\$250) Exclusive (\$500): Check enclosed Pay [Online](http://bit.ly/JoinPAG) (http://bit.ly/JoinPAG).

Please mail or email this form to: The Catholic Foundation, advisors@catholicfoundationmichigan.org.