APPLICATION FOR INCLUSION IN

COMMUNITY FOUNDATION SONOMA COUNTY'S

DIRECTORY OF PROFESSIONAL SERVICE PROVIDERS

The Community Foundation and other local nonprofit organizations often receive inquiries from individuals who wish to make charitable contributions and planned gifts and who are interested in consulting a professional about this process. To accommodate these requests, the Community Foundation has compiled a directory of professional service providers which is provided to the public on request and is available on our website.

If you wish to be included in the directory, complete the attached application and mail it to the Community Foundation. Please be as detailed as possible in completing the application, especially in regard to your experience and expertise relating to planned charitable giving. If you have a professional CV that covers details requested, feel free to attach it. The application materials of those who are listed in the directory will be available for inspection by the public.

**It is important for you to know that each professional listed in the directory is expected to provide a free one-hour consultation with any prospective client referred to him or her through the directory. By returning your application you indicate that you agree to provide this consultation to prospective clients.**

The following “Notice to Users of this Directory” appears at the front of the directory. Please review it as it includes important information abut our policy regarding the directory.

Thank you for your participation in this effort to support philanthropy in Sonoma County.

# NOTICE TO USERS OF THIS DIRECTORY

Each professional listed in this directory has agreed to provide a free one-hour consultation with any prospective client referred through this directory who is interested in discussing a charitable gift to the Community Foundation or any nonprofit organization. As a prospective client, you may contact the professional directly. Let them know you obtained their name via Community Foundation Sonoma County's *Directory of Estate Planning – Professional Service Providers* and confirm their willingness to provide a one-hour free consultation.

Community Foundation Sonoma County does not guarantee the qualifications or competency of any person listed in this *Directory* and is not responsible for any errors or omissions of any person listed. Although the Community Foundation has compiled this directory, it has done so based on information supplied by the persons listed. This directory is not a complete listing of all persons with the requisite qualifications or competency, and the omission of others from this directory does not imply a negative assessment or any evaluation or recommendation whatsoever. Community Foundation strongly recommends that users of this directory conduct their own review of the persons listed in this directory before retaining them to perform any professional services.

If you would like to review more detailed information regarding the professionals listed in this directory, please contact Community Foundation's office during business hours.

1. Name \_\_\_\_\_\_\_\_

2. Title

3. Company Name

4. Address

5. Telephone Fax

6. E-Mail Web

7. Occupation

8. Professional licenses held

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Educational background:

a. College (degree and year)

b. Professional programs (degree and year)

c. Advanced professional programs (degree, if any, and year)

10. List all positions ever held in this occupational field, including years

11. Have you ever been the subject of disciplinary proceedings by any professional licensing body or other accrediting organization?

If yes, please explain

12. Have you ever been the defendant in a professional malpractice action or any similar action bearing on your professional competence, the manner in which you conduct your professional practice, or your character?

If yes, please explain

13. List professional organizations of which you are a member

14. List professional honors which you have received

15. Please describe, in detail, the exact nature of your professional practice, specifically including your experience in the areas of estate planning, financial planning, and planned charitable giving

1. List civic and community organizations of which you are or have been a member,   
   including dates

17. Provide additional information regarding your professional abilities and qualifications

18. Optional:

a. List any hobbies or personal interests

I declare that the foregoing information is complete and accurate. I agree to provide a free one-hour consultation to any prospective client referred to me through Community Foundation Sonoma County's *Directory of Estate Planning Professional Service Providers*.

Signature Dated