



**Membership** in the **San Diego Planned Giving Partnership** strives to engage all constituents in the charitable gift planning process: planned giving and major gifts professionals, nonprofit managers and trustees, financial and estate planners, trust managers and administrators.

Member privileges in the **SDPGP** include:

- Discounted registration to all SDPGP programs including the annual combined meeting with the Association of Fundraising Professionals San Diego
- Networking opportunities with planned giving professionals
- Opportunities to gain professional education on current planned giving topics and trends
- Special invitations to other partner organization’s events and meetings
- Complimentary job posting on the SDPGP website – must be a position within your own organization
- SDPGP Membership Directory

**NEW MEMBER APPLICATION**

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Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
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FAX: \_\_\_\_\_  
E-mail: \_\_\_\_\_

**DUES**

I would like to make a Professional commitment to planned giving by joining the **San Diego Planned Giving Partnership**.

**Annual Membership Dues:      \$60.00**

**PAYMENT OPTIONS:**

Check payable to the **San Diego Planned Giving Partnership**. Please retain a copy for your records and return this form to the  
**San Diego Planned Giving Partnership**  
**10755 Scripps Poway Pkwy #458**  
**San Diego, CA 92131**

For Credit Cards, please go to [www.sdpgp.org](http://www.sdpgp.org) and click on the Membership tab for the PayPal payment option.

I certify that I have read and subscribe to the *Model Standards of Practice for the Charitable Gift Planner* (see reverse side), and I accept the responsibility to abide by that Code.

**Type name above in place of signature:**

**Date:**

Email completed application to: Jan Ozenbaugh, [membership@sdpgp.org](mailto:membership@sdpgp.org)

Membership is available to individuals only and is not transferable. Membership is effective for one year from the date dues are received. Membership does not include PPP national dues. For national dues please visit [www.pppnet.org](http://www.pppnet.org).

# Model Standards of Practice for the Charitable Gift Planner

## Preamble

The purpose of this statement is to encourage responsible gift planning by urging the adoption of the following Standards of Practice by all individuals who work in the charitable gift planning process, gift planning officers, fund raising consultants, attorneys, accountants, financial planners, life insurance agents and other financial services professionals (collectively referred to hereafter as “Gift Planners”), and by the institutions that these persons represent.

This statement recognizes that the solicitation, planning and administration of a charitable gift is a complex process involving philanthropic, personal, financial, and tax considerations, and often involves professionals from various disciplines whose goals should include working together to structure a gift that achieves a fair and proper balance between the interests of the donor and the purposes of the charitable institution.

## I. Primacy of Philanthropic Motivation

The principal basis for making a charitable gift should be a desire on the part of the donor to support the work of charitable institutions.

## II. Explanation of Tax Implications

Congress has provided tax incentives for charitable giving, and the emphasis in this statement on philanthropic motivation in no way minimizes the necessity and appropriateness of a full and accurate explanation by the Gift Planner of those incentives and their implications.

## III. Full Disclosure

It is essential to the gift planning process that the role and relationships of all parties involved, including how and by whom each is compensated, be fully disclosed to the donor. A Gift Planner shall not act or purport to act as a representative of any charity without the express knowledge and approval of the charity, and shall not, while employed by the charity, act or purport to act as a representative of the donor, without the express consent of both the charity and the donor.

## IV. Compensation

Compensation paid to Gift Planners shall be reasonable and proportionate to the services provided. Payment of finder’s fees, commissions or other fees by a donee organization to an independent Gift Planner as a condition for the delivery of a gift is never appropriate. Such payments lead to abusive practices and may violate certain state and federal regulations. Likewise, commission-based compensation for Gift Planners who are employed by a charitable institution is never appropriate.

## V. Competence and Professionalism

The Gift Planner should strive to achieve and maintain a high degree of competence in his or her chosen area, and shall advise donors only in areas in which he or she is professionally qualified. It is a hallmark of professionalism for Gift Planners that they realize when they have reached the limits of their knowledge and expertise, and as a result, should include other professionals in the process. Such relationships should be characterized by courtesy, tact and mutual respect.

## VI. Consultation with Independent Advisers

A Gift Planner acting on behalf of a charity shall in all cases strongly encourage the donor to discuss the proposed gift with competent independent legal and tax advisers of the donor’s choice.

## VII. Consultation with Charities

Although Gift Planners frequently and properly counsel donors concerning specific charitable gifts without the prior knowledge or approval of the donee organization, the Gift Planner, in order to insure that the gift will accomplish the donor’s objectives, should encourage the donor early in the gift planning process, to discuss the proposed gift with the charity to whom the gift is to be made. In cases where the donor desires anonymity, the Gift Planner shall endeavor, on behalf of the undisclosed donor, to obtain the charity’s input in the gift planning process.

## VIII. Description and Representation of Gift

The Gift Planner shall make every effort to assure that the donor receives a full description and an accurate representation of all aspects of any proposed charitable gift plan. The consequences for the charity, the donor and, where applicable, the donor’s family, should be apparent, and the assumptions underlying any financial illustrations should be realistic.

## IX. Full Compliance

A Gift Planner shall fully comply with and shall encourage other parties in the gift planning process to fully comply with both the letter and spirit of all applicable federal and state laws and regulations.

## X. Public Trust

Gift Planners shall, in all dealings with donors, institutions and other professionals, act with fairness, honesty, integrity and openness. Except for compensation received for services, the terms of which have been disclosed to the donor, they shall have no vested interest that could result in personal gain.

Adopted and subscribed to by the National Committee on Planned Giving and the American Council on Gift Annuities, May 7, 1991. Revised April 1999. Reprinted with permission.