

## Legacy Advisors Application

You have been nominated to become a member of the Children's Legacy Advisors. Please note we welcome practicing and retired advisors to become members. Based on your nomination, we invite you to complete the following application. Please submit this application or send any questions to [legacyadvisors@childrensmn.org](mailto:legacyadvisors@childrensmn.org).

### Applicant Information

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Type of Organization: \_\_\_\_\_

Years of Experience: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Office Phone: \_\_\_\_\_ Cell Phone (optional): \_\_\_\_\_

Email: \_\_\_\_\_

Web Address for Organization or Biography: \_\_\_\_\_

Professional Designation(s) (e.g. Attorney, CPA, etc.): \_\_\_\_\_

My professional practice focuses on the following areas of planning: \_\_\_\_\_

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

What interests you about Legacy Advisors? \_\_\_\_\_

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

What benefit do you find in discussing charitable estate planning with your clients? \_\_\_\_\_

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

May we publish your name in our roster of Legacy Advisors? \_\_\_\_\_ Yes \_\_\_\_\_ No

### Sponsor Information

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

### **Application Submission**

By signing and submitting this application, the applicant agrees to notify Children's Minnesota Foundation of any disciplinary proceedings or events that compromise the applicant's good standing in his or her profession. Further, in accepting membership, the applicant acknowledges that he or she is not an agent of Children's Minnesota in any capacity.

I understand that Children's Minnesota Foundation respects the need of estate and financial planning professionals to be objective, to advise their clients from an unbiased perspective, always representing the clients' very best interests, whether or not the plans include a significant gift to Children's Minnesota.

Applicant Signature (Please use initials): \_\_\_\_\_