



The International Association of
Advisors in Philanthropy™

Transforming communities through inspired givingSM

Membership Benefits

- ♥ Annual **Conference on Philanthropy** in the spring (April 19-20, 2012) where we bring top speakers and leading philanthropists to help you in all aspects of your practice.
- ♥ A **Members Resource** area on the website where you have access to an extensive library of **recorded webinars** and topics by the brightest minds in the industry; an extensive database of members and non-members with search capabilities; sample business documents, resources and articles, and copies of our Bylaws and Code of Ethics. You can access and update your personal contact information and bio, and your **CE Transcript** can be accessed, when you are logged in.
- ♥ Ability to review and sit for the American College courses needed for the **Chartered Advisor in Philanthropy (CAP)** designation. This is held as a pre-conference workshop in April. You must be a member of AiP and be enrolled with the American College.
- ♥ New Benefit -- opt in to the member's only **AiP Public Speaker Search** by entering your speaking experience using the speaker application under the Education & Training tab on the AiP Website. AiP will promote the speaker search to chapter leaders, the public in general, and in the trade journals starting Feb 2012.
- ♥ **Downloadable Reports** available to members only, including a list of conference attendees, members, sponsors, and philanthropic and financial trade media which members can access on the left toolbar after signing in.
- ♥ **Free Monthly Educational Webinars** by some of the leading professionals in our industry. Most carry 1 CFP & PACE credit.
- ♥ **Networking opportunities** at our annual conference with the top professionals in this field. Meet our speakers, sponsors and other members and explore the expertise, products and services they have available to you. Join the **AiP LinkedIn** group and expand your collaborative possibilities!
- ♥ **Synergistic Alliances** with collegial organizations, training programs and media covering philanthropic planning.
- ♥ **Discounts** on **training programs** and **books** for our members.
- ♥ Your name, bio and photo listed in our **Website Membership Directory**. This provides an informal referral source for members and potential clients – link your emails and website to your bio on our website.
- ♥ Opportunity to serve on one of our various **Committees** and to develop an **AiP Chapter** in your region to truly impact the direction and success of the Association and position yourself as a leader in the industry. If you would like to serve, contact our office for options.
- ♥ The ability to assure your clients that you belong to a larger organization of **coast-to-coast** advisors who are a resource for any questions or problems that you might encounter.

Advisors in Philanthropy

95 West Street, Rocky Hill, CT 06067 Toll Free: 888-597-6575 Fax: 860-721-7406

AdvisorsinPhilanthropy.org

OUR VISION AND MISSION

Our Vision: The #1 association for advisors in philanthropic planning
The International Association of Advisors in Philanthropy, Inc. is a forum of professional advisors who are dedicated and inspired to teach and empower clients to effectively direct their philanthropic resources consistent with their deepest values.

Our Mission:

- ♥ To inspire and educate advisors, helping them make philanthropic planning an integral part of their practice
- ♥ To create a unique network of support through collegial relationships among a diverse spectrum of professionals attracted to membership in our organization
- ♥ To promote the highest ethical standards in philanthropic planning

Our Promise: *Inspired Giving*

Our Name: Our name reflects our global vision of serving professional advisors, inspiring them, educating them and helping them to integrate philanthropy into their practices. They in turn inspire and empower their clients to use their resources to transform communities around the world.

AiP Member Profile: The typical AiP member is an entrepreneur-minded professional advisor with a deep passion and commitment to collaborate with like-minded professionals from all over the world. He or She has been in business for at least 15 years, and has a strong desire to build and/or improve upon the deliverables he/she is currently offering clients, particularly in the area of Philanthropic Planning. The AiP member is charitable themselves, active in Non Profit organizations in their own community, and is very generous with their time, talents, and treasures. He/She has already received years of specialized training in tax, legal, financial, fiduciary, or Non-Profit Leadership and is eager to expand their influence outside of their designated “specialty” by building collaborative relationships with experts in related fields throughout North America. The AiP member is a Life Long Learner, always seeking additional wisdom and knowledge to bring increased value to their client relationships. He/She is constantly searching for opportunities to expand their expertise as a Philanthropic Advisor, yet give back at the same time by offering their technical knowledge and client relationship skills back to the membership through webinars and other training programs. The AiP member is known for their integrity & professionalism, and is in complete compliance with the Code of Ethics required of them in their specific industry.

Brand Promise: Our promise, *transforming communities through inspired giving*, defines our purpose. We are passionate about the life-changing power of philanthropy and its vital role in our world today.

Our Symbol: Our symbol represents the lifting up of philanthropy to the world as strategy, as vision and as mission. The heart signifies love for humankind. The figure can be viewed as our organization collectively, as our member advisors individually or the empowered client. Together, these elements compose a message of ... *Inspired Giving*.

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