

Professional Advisors Information

Please return this form and/or direct your inquiries to:

Devesh Khату, Development Officer
870 Market Street, Suite 728, San Francisco, CA 94102
Tel: 415.398.2333 x115 Fax: 415.398.4733
dkhatu@horizonsfoundation.org

_____ Please check here if you are listed in the
2009 Directory of Professional Advisors for the LGBT Community
at <http://www.horizonsfoundation.org/pdf/advisorguide2009.pdf>
and your information has not changed. You need not fill out the form again.

Name _____

Title _____

Company _____

Street _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Email _____ Website _____

Please provide a ONE sentence description on how you wish your services to be listed:

Please check all that apply:

- Financial Advisor
- Tax Preparer
- Fiduciary

- Estate Planning Attorney
- Adoption and Domestic Relations
- Other (Please specify)

For our files:

Please list licenses, certificates or degrees that you possess:

Comment on your experience on working with the LGBT community or clients:

How many years have you worked in the field?

Areas of expertise? Specialty?

Fee structure and/ or minimums:

Please feel free to add anything about yourself that you believe distinguishes you as an individual and or professional:

Community Leader Information

As with our 2009 Advisors Guide, Horizons Foundation is going to denote each advisor who is a leader in our community, either through giving their time or money to the Bay Area's LGBT community. Horizons Foundation is dedicated to increasing philanthropy in the LGBT community *to* the LGBT community. Since **our research shows that only about 5% of the LGBT people in our community give to LGBT-specific organizations (and only 2% to *local* LGBT organizations)**, we have a long way to go to reach our community's potential.

_____ Are you a current Leadership Circle member of Horizons Foundation?
(Give \$1,000 or more annually)

_____ Are you currently serving on a Board of Directors of a local LGBT organization?
If yes, which one(s): _____

_____ Do you give something equivalent of a leadership gift to another local LGBT organization? If so, which one(s): _____

_____ Have you referred a client(s) to Horizons Foundation for a planned gift or a life-time gift? If authorized to reveal, please tell us whom: _____

If you can check yes to any of the above, Horizons Foundation will denote your name in our directory with your name in all caps.

Thank you for giving back to our community!