

Professional Advisors Information

Please complete pages 1 and 2 in their entirety to be listed in Horizons Foundation's 2011 Directory of Professional Advisors for the LGBT Community.
Page 3 is optional and for our records.

Please return completed form to:

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

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): _____

Community Leader Information

As with our previous directories, Horizons Foundation will 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)

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

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

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

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

Thank you for giving back to our community!

For our files (optional):

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:
