

Professional Advisors Information

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

Henry Pacheco, Philanthropic Services and Development Associate
870 Market Street, Suite 728, San Francisco, CA 94102
Tel. 415.398.2333 ext.114 Fax 415.398.4733
hpacheco@horizonsfoundation.org

Name_____

Company_____

Street Address_____

City_____ State_____ Zip_____

Phone_____ Fax_____

Email_____ URL_____

Please provide us with a one sentence description on how you wish your services to be listed:

Please check all that apply

- | | |
|---------------------------------------------|-------------------------------------------------------|
| <input type="radio"/> Financial Advisor | <input type="radio"/> Attorney/ Adoption & Family Law |
| <input type="radio"/> Accountant | <input type="radio"/> Attorney/ Tax & Estate Planning |
| <input type="radio"/> Philanthropic Advisor | <input type="radio"/> Conservator & Fiduciaries |

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:

CHANGES | UPDATES

Beginning with our 2008 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. We know that donors who are looking for professional services also care about this, so we are excited to introduce this new feature in our 2008 Guide.

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

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

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

____ 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!