

Application for Membership

Name _____

Title _____

Company or other entity _____

Mailing address _____

Telephone _____ Fax _____

Email _____ Website _____

Type of membership for which you are applying:

Grantmaking Member

- Government agency that makes grants
- Regranting organization
United Way; university, hospital, or other operating foundation; or statewide intermediary
- Giving circle

Associate Member

- Professional philanthropic advisor or trust officer
Please complete the back of this form!
- Individual
Retired grantmaker, former foundation board member, or student of philanthropy

Annual Dues

| | |
|--|---|
| Government agency | \$500 |
| Regranting organization (operating, hospital, UW, university, or statewide intermediary) | <i>Based on annual grantmaking</i> |
| | \$330 \$499,999 or less |
| | \$550 \$500,000 – \$999,999 |
| | \$1,100 \$1 million – \$2 million |
| | \$2,200 \$2 million or more |
| Giving circle | \$250 |
| Professional advisor or trust officer | \$500 for an individual; \$400 each for 2 or 3 individuals from same firm; \$1,500 total for 4+ individuals from same firm (10% discount if corporate foundation is IPA member) |
| Individual | \$50 |

Become a Member of IPA's Leadership Circle

In support of IPA's efforts to promote and protect Indiana's philanthropic sector, I would like to make an additional gift in the amount of \$_____.

Method of payment:

- Check
- Credit card
Call 317-630-5200 ext. 110 to make a credit card payment.

Mail checks and completed forms to:

Indiana Philanthropy Alliance
32 East Washington Street, Suite 1100
Indianapolis, IN 46204

Please complete this page only if you are a professional advisor or trust officer.

Additional Information

Type of advisor:

- Attorney
 - Bank trust officer
 - Certified financial planner
 - Investment advisor
 - Other (please describe below)
-

Type of clientele (select all that apply):

- Foundations
 - Trusts
 - Individuals
 - Families
 - Other (please describe below)
-

Briefly describe how IPA can help you better serve your clients.

Conditions of Membership

Associate membership for professional advisors in Indiana Philanthropy Alliance indicates your willingness and commitment to:

Subscribe to the highest standards of competence and ethical practice

Advance clients' philanthropic goals in accordance with applicable charitable and philanthropic laws and regulations

Share knowledge and experience to strengthen Indiana philanthropy

Agree not to use membership to solicit business

Disclaimer

Indiana Philanthropy Alliance retains final discretion on all matters concerning membership approval.

Signature _____ Date _____

Dues Categories

| Annual Grantmaking | Dues |
|---------------------------|-------------|
| \$10 million or above | \$13,750 |
| \$7,000,000 – \$9,999,999 | \$11,000 |
| \$5,000,000 – \$6,999,999 | \$8,250 |
| \$3,000,000 – \$4,999,999 | \$6,050 |
| \$2,000,000 – \$2,999,999 | \$3,850 |
| \$1,500,000 – \$1,999,999 | \$2,750 |
| \$1,000,000 – \$1,499,999 | \$2,200 |
| \$500,000 – \$999,999 | \$1,100 |
| \$200,000 – \$499,999 | \$550 |
| \$199,999 or below | \$330 |

Organizations that answer “yes” to the following questions are likely eligible for IPA membership:

Is your organization a grantmaking entity that distributes grants?

Does your organization have a documented process of its grantmaking?

Membership support is based on total grant dollars awarded in the latest reporting year. Foundations and corporations headquartered outside of Indiana pay dues based on grants made in Indiana only.

Membership dues in excess of \$330 may be made as a grant from your organization.

Membership is for a full 12 months and will be prorated as appropriate.

Indiana Philanthropy Alliance retains final discretion on all matters concerning membership approval. Please contact IPA at 317.630.5200 with questions about membership eligibility or dues.

Associate Membership Dues

| | |
|--|---|
| Government agency that makes grants | \$500 |
| Regranting organization operating on a state or local level (United Way; hospital, university, or other operating foundation; or statewide intermediary) | Based on annual grantmaking \$330 \$499,999 or less \$550 \$500,000 – \$999,999 \$1,100 \$1 million – \$2 million \$2,200 \$2 million or more |
| Giving circle | \$250 |
| Professional philanthropic advisor or trust officer | \$500 for an individual \$400 each for 2 or 3 individuals from the same firm \$1,500 for 4+ individuals from the same firm 10% discount if corporate foundation is IPA member |
| Individual (retired grantmaker, former foundation board member, or student of philanthropy) | \$50 |