



RADY CHILDREN'S ESTATES AND TRUSTS COUNCIL

Mission Statement

We are financial professionals dedicated to developing strong relationships on matters related to philanthropic planning in partnership with Rady Children's Hospital Foundation.

The mission of the Council is to Educate, Inspire and Support.

Educate

We seek to educate estate and financial planning professionals and community members about Rady Children's current developments and future goals, as well as the critical role that philanthropy plays in transforming pediatric healthcare.

Inspire

We inspire estate and financial planning professionals and community members to build relationships with Rady Children's through volunteering, committee membership, advocacy and financial support.

Support

We support the mission of the Estates and Trust Council through philanthropic advocacy, inviting other professionals to join the Council and engaging in support of Rady Children's Hospital that is personally meaningful.

I wish to become a Rady Children's Estates and Trusts Council Member.

Name, Title: _____

Company Name: _____

Address: _____

City, Zip: _____

Phone: _____ **E-mail:** _____

Invited by: _____

Signature*: _____ **Date:** _____

*By signing above, I certify that I act in accordance with my profession's standards of conduct and that I will provide the appropriate waivers of conflict, disclosures and disclaimers to clients regarding my relationship with Rady Children's Hospital-San Diego and Rady Children's Hospital Foundation.

Thank you for your service and dedication to Rady Children's Hospital-San Diego.

Please return to:
Office of Gift Planning
Rady Children's Hospital Foundation
3020 Children's Way, MC 5005 San Diego, California 92123-4282
Email: jgarcia5@rchsd.org Phone: 858.966.5804



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Membership Information

Who We Are:

Estates and Trusts Council Members are estate and financial planning professionals who believe in Rady Children's mission and share the passion to revolutionize the future of pediatric medicine.

Benefits to Members:

- Opportunities to network with other high-caliber professionals;
- Invitations to various exclusive Rady Children's events;
- Receive current information on Rady Children's programs and initiatives;
- Name listed on Council roster posted on the Rady Children's Foundation website and provided to donors upon request; and
- Pride of knowing that your efforts will help provide the most advanced healthcare for our children in San Diego today and for many generations to come.

Expectations for Members:

- Educate ourselves and other estate and financial planning professionals on Rady Children's vision, institutes and programs;
- Communicate Rady Children's vision and information about its institutes and programs to our individual and professional network;
- Support Rady Children's vision to revolutionize the future of pediatric medicine in whatever capacity is personally meaningful;
- Attend the annual Professionals Symposium; and
- Attend the annual Estates and Trusts Council meeting.

Additional Ways to Be Involved:

- Bring colleagues and clients to Rady Children's Hospital events;
- Join a task force: Membership, Professionals Symposium, Sponsorship and Planned Giving Education;
- Invite Gift Planning staff to present on Rady Children's and philanthropic planning to colleagues or clients;
- Contribute articles or speak on estate, financial and charitable planning for various Rady Children's education efforts;
- Offer to serve as a resource for technical questions on charitable gifts; and
- Attend other Rady Children's or Rady Children's Hospital Auxiliary events.