

Partner With Us

Planned Giving Professionals Directory Application



The Placer SPCA is pleased to list those professionals who:

- Attend at least one professional forum hosted by the Placer SPCA on an annual basis.
- Express an interest in assisting current and potential donors of the Placer SPCA.
- Have professional credentials, licenses or specialty in one of the following professions: financial planning, certified public accounting, estate/legacy planning, or charitable giving.

The directory is comprised of professionals who have attended the Placer SPCA planned giving workshops and/or forums and are familiar with our organization, mission, and services. This list is in no way intended to be a referral to one specific agency and/or professional.

Sample Directory Entry:



Company

NorthRock Partners
3741 Douglas Blvd., Ste. 290
Roseville, CA 95661
www.northrocksacramento.com

Education

B.A.A. Accounting/Business Management, Northwood University

Specialty

Comprehensive financial planning for families and small business owners. Specialties include:

- Retirement Income Planning
- Investment Management
- Tax & Estate Planning
- Charitable Giving Strategies

Schedule a meeting

Your introductory session is complimentary, please contact Colin at:
916.232.4512
colin.grahl@northrockpartners.com

**Please provide us the following information exactly as you would like it to appear in the Placer SPCA
Planned Giving Professionals Directory:**

Name: _____ Company: _____

Professional Focus: Estate Planning Attorney
 Certified Public Accountant
 Financial Planner
 Private Fiduciary
 Other: _____

Address: _____

City: _____ State: _____ Zip: _____

Website: _____

Education (degree/school): _____

Insurance / License #: _____

Professional Designations: _____

Specialty: _____

To schedule a meeting: _____

Is the introductory session complimentary? Yes No

Email: _____ Phone: _____

Please list on directory page

Please list on directory page

I acknowledge that in order to remain in the Placer SPCA Planned Giving Professional
Directory I must attend at least one professional forum on an annual basis.

Signature: _____

Please send your completed form and a high-resolution photo to plannedgiving@placerspca.org