

DonorAdvisor™ Application

Global Gift Fund®

A Donor Advised Service of MDRT Foundation

Thank you for your interest in becoming a DonorAdvisor. In order to qualify, an individual must pay an annual association fee of \$75, complete a self-study program and take a self-administered exam provided by the Foundation. For the annual fee, a DonorAdvisor receives a DonorAdvisor Manual, educational packet and exam, PowerPoint® presentation to market Global Gift Fund and discounts on Wealthy and Wise® (InsMark's estate and charitable planning system), and related materials.

Information

Name	Company	
Mailing Address (P.O. Box may be used)		
City, State, Zip Code		
Business telephone:	Fax Number:	Email:

I am a Registered Representative I am a Registered Investment Advisor (RIA)

I am a Registered Representative of a Registered Investment Advisor

My Broker/Dealer is: _____ **My Rep. #** _____

Professional qualifications or memberships: CLU ChFC CFP Other _____

I understand that the DonorAdvisor trademark is the property of the MDRT Foundation and is used to describe a professional advisor who provides information and education to his/her clients about Global Gift Fund and other charitable giving options through the Foundation. Enclosed is my check for \$75 with my application to become a DonorAdvisor. I am prepared to take the self-study course and exam and to follow the Global Gift Fund guidelines outlined in the DonorAdvisor Manual.

Please enroll me as a DonorAdvisor Attached is my check for \$75 payable to the MDRT Foundation

Or charge my Visa MC AX #: _____ Expiry date: ___/___/___

Please Print Name: _____

Signature: _____ Date: _____

<p><i>Mail to:</i> Global Gift Fund Advisor Services 325 W. Touhy Ave. Park Ridge, IL 60068</p>
--

For additional information, call: Toll Free (877) 685-4644

For Global Gift Fund Use Only

_____ date information packet mailed _____ DonorAdvisor acceptance letter

_____ date exam completed / signed memorandum of understanding

**Global Gift Fund DonorAdvisors™ Qualify for \$300 Discount
On InsMark's Wealthy and Wise®**

Wealthy and Wise® is InsMark's estate and charitable planning System. The licensing fee for the System is \$1,499 plus \$49.95/month. The MDRT Foundation has arranged for a \$300 discount available only to DonorAdvisors. In addition to the discount, InsMark will also provide all DonorAdvisors with complimentary copies of both a computer screen show and a video entitled *Testing Financial Tolerance for Charitable and Family Giving*, an additional \$225 value.

For more information on Wealthy and Wise®, contact InsMark at (925) 543-0500. Please ask for an account executive and identify yourself as a potential new DonorAdvisor for the Global Gift Fund of the MDRT Foundation.

InsMark: Please license me for Wealthy and Wise® for \$1,199 and \$49.95/month. Below is my authorization to charge my credit card for the licensing fees.

___ Visa ___ MC ___ AX #: _____ expiry date: ___/___/_____

<i>Please print name:</i>

Signature: _____ **Date:** _____