



Partners in Stewardship • Trusted Professionals Guiding Faithful Giving

Membership Guidelines

The Professional Advisors Network brings together Accountants, Estate Planning Attorneys, Financial Advisors, and Insurance and Trust Professionals who share a commitment to stewardship and service to the Catholic community. Network members collaborate with the Roman Catholic Foundation to promote thoughtful charitable planning that benefits parishes, schools, and ministries in our Catholic community. These guidelines outline the expectations and opportunities of participating in the Network.

WHO THE NETWORK IS FOR

Membership in the Professional Advisors Network is open to professionals who are:

- In good standing within their profession and committed to serving their clients with integrity and excellence
- Active Catholics and respected parishioners
- Willing to help clients steward their resources through thoughtful financial, estate, and charitable planning
- Committed to supporting the parishes, schools, and ministries of our Catholic community

WAYS TO GET INVOLVED

Members of the Professional Advisors Network are encouraged to:

- Attend Network events and educational gatherings
- Promote charitable and planned giving in partnership with the Foundation
- Encourage other qualified professionals to learn about and participate in the Network
- When appropriate, share professional expertise through educational seminars hosted by the Foundation

A SPIRIT OF COLLABORATION

Members are expected to conduct themselves in a professional, ethical, and respectful manner in all interactions related to the Professional Advisors Network. To preserve the Network's collaborative spirit:

- Members should refrain from using membership as a platform for marketing or solicitation of services to other members
- Members may reference their participation in the Network within professional biographies or profiles, but not in advertising or promotional materials

WHAT MEMBERS GAIN

Members of the Professional Advisors Network can:

- Connect, network, and learn at Network events
- Grow in faith and understand the spirituality of giving
- Receive resources from the Foundation that support philanthropic conversations with clients
- Participate in special Network events with the Archbishop of St. Louis
- Gain visibility in the Foundation's online Network directory

If you have questions, please contact: Laura Clark, Gift Planning Officer

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The Roman Catholic Foundation is grateful for the generosity and expertise of the professionals who participate in the Professional Advisors Network and help strengthen the Church for future generations.