

**PROFESSIONAL ADVISOR PROFILE FORM**

This form is maintained in the confidential files of XYZ Charity for use in communicating with professional advisors that work with and support the development activities of XYZ Charity, and to provide recommendations to donors that need professional assistance. No information on this form will be released or recommendation made to donors without the approval of the advisor in the approval section of this form.

**Please complete this form and return to:**

**Development Officer  
XYZ Charity  
123 East Street  
Anywhere, State USA 12345**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Name of Company or Firm

\_\_\_\_\_  
Office Mailing Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Office Telephone Fax E-Mail

\_\_\_\_\_  
Home Address

\_\_\_\_\_  
Home Telephone Fax E-Mail

\_\_\_\_\_  
Date of Birth Spouse's Name

\_\_\_\_\_  
Children's Names (Ages)

*Professional Specialty:* \_\_\_ Accountant \_\_\_ Attorney  
\_\_\_ CLU/ChFC \_\_\_ Financial Planner \_\_\_ Securities Broker  
\_\_\_ Trust Officer Other: \_\_\_\_\_

