



## 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 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.

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### 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 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 Foundation  
3020 Children's Way, MC 5005 San Diego, California 92123-4282

**Email:** [giftplanning@rchsd.org](mailto:giftplanning@rchsd.org) | **Phone:** 858.966.5804



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### Member Benefits

**As a member of the Estates and Trusts Council at Rady Children's, you will receive:**

- Opportunities to network with leading estate, financial, and philanthropic planning professionals
- Invitations to exclusive Rady Children's events and educational programs
- Timely updates on key initiatives, programs, and developments at Rady Children's Hospital
- Recognition on the Council roster, which is featured on the Rady Children's Foundation website and shared with donors upon request
- The satisfaction of contributing to world-class pediatric care for children in San Diego— today and for generations to come

### Member Expectations

**Council members are asked to:**

- Stay informed about Rady Children's mission, strategic vision, and signature programs
- Share information about the Hospital's work and impact within your professional and personal networks
- Support Rady Children's in a way that is personally meaningful, whether through time, expertise, or charitable giving
- Attend the annual Professionals Symposium
- Participate in the annual Estates and Trusts Council meeting

### Additional Opportunities to Engage

**Members are also encouraged to deepen their involvement by:**

- Bringing clients or colleagues to Rady Children's events and educational sessions
- Joining a task force—Membership, Professionals Symposium, Sponsorship, or Planned Giving Education
- Inviting Gift Planning staff to speak to clients, colleagues, or at firm events
- Contributing articles or offering to speak on estate, financial, or charitable planning topics
- Serving as a technical resource for questions related to charitable giving strategies
- Attending additional Rady Children's or Rady Children's Hospital Auxiliary events