



**CFA GladVisor Volunteer Member Program  
Covenant Agreement & Application**  
(Please Print)

Name (First, Middle Initial, Last)	Date of Birth
Address	Home Phone
City, State, ZIP Code	Work Phone
Cell Phone	E-mail
Your Church and Address	
Pastor Name, phone and email (for reference)	
Your Professional background and current credentials (or if retired, former credentials) Include any license # info.	
Describe briefly-Why do you want to serve as a CFA GladVisor?	
Your (brief) Christian testimony	
Two References (name, affiliation, email & phone # ):	
Are you interested in volunteering at your church, and local community only, virtually for others, or a combination?	

I have read and understand the terms and conditions printed below. If this application is accepted, I agree to abide by the CFA GladVisor COVENANT Agreement. I hereby apply to become a GladVisor Member.

Signature of Applicant \_\_\_\_\_

Today's Date \_\_\_\_\_ Approved \_\_\_\_\_

## GladVisor Covenant Agreement with Christian Foundation of America

In accordance with terms and conditions below, I submit my application to become a member of the GladVisor program at Christian Foundation of America (CFA). **I understand and agree:**

1. The relationship of GladVisor to CFA is as an invited member of the “CFA GladVisors Program (GladVisors)”. GladVisor is a short name for “Generosity and Legacy Advisor”. CFA offers the GladVisor program to further its mission “Inspiring Generosity for Christian Impact”, recognizing many Christian professionals seek to volunteer their substantial gifts of knowledge through education and coaching in the stewardship of generosity and legacy.
2. I profess to be an active, discipling Christian and I abide by a Christian Statement of Faith, generally in keeping with the CFA Statement of Faith. I agree to abide by Biblical principles of stewardship in my own professional and personal life, and to promote, educate and coach others using Biblical principles, advancing Generosity and Legacy as core stewardship teachings.
3. As a member of CFA’s GladVisor program, I agree to volunteer by donating my time and knowledge in providing educational and coaching services to Christian churches or charities, or individuals in the stewardship of generosity and legacy. I freely accept this volunteer role out of a commitment to serve the Christian community. I agree to provide at least two educational sessions per year to a Christian church, charity or group, using GladVisor materials.
4. The GladVisor role is for seasoned (at least 10 years) financial/legal professionals including but not limited to RIA, CFP, CPA, Trust/Estate attorneys, and planned charitable giving professionals. I agree to provide confirmation and references regarding my experience and credentials in good standing, or if retired, from past service. I agree to abide by the highest fiduciary, professional and ethical standards, including but not limited to privacy, confidentiality, honesty, and protecting sensitive information of others. While CFA intends that GladVisor educational information is non-technical in nature, I agree that I will only present GladVisor educational information when I am comfortable with the general nature of the subject matter.
5. I understand that a church or charity invites me as a GladVisor under a relationship of trust. It is common that churches and charities require “No Solicitation”. The CFA GladVisor program has been designed with this in mind. As CFA is a charitable organization and does not conduct worship or direct services, Christian organizations view CFA as a trustworthy, neutral party offering education in generosity and legacy-specialty areas where they don’t have expertise. As a GladVisor, I acknowledge this relationship of trust, and agree that I will not solicit any business, sales of services or merchandize or otherwise market related to my professional job, business or career at any time while providing GladVisor volunteer services. CFA permits GladVisors to include a brief resume so participants understand the GladVisor’s professional experience, but this information must be brief and not include solicitation.
6. CFA will provide the following to me as a GladVisor: Access to the GladVisor web-based “dashboard” of literature, links, educational content in the form of seminars, videos, powerpoint and handouts appropriate to each session, and marketing aids. Orientation and periodic training or coaching call sessions, and notices about the Gladvisor program will be available. The education and resources made available by CFA to GladVisors will be non-technical in nature, intended to provide ideas and motivation about generosity and legacy. CFA cannot provide financial, tax or legal advice. As a GladVisor I agree to adhere to general education and motivation of non-technical information, and will not provide financial, tax or legal advice.

7. I understand that as a result of volunteering as a GladVisor, individuals or organizations may choose to seek services from CFA in the areas of charitable planned giving or charitable funds management. In accordance with established industry standards and state and federal laws for charitable gifts and charitable planned giving services, no party may compensate me for finder or referral fees, commissions, or other forms of contingent compensation. I expressly understand and acknowledge that the Gladvisor role solely for education outreach and coaching; there is no expectation to provide fundraising services on behalf of CFA or any charity as a GladVisor.
8. I understand that I may use only official CFA GladVisor literature in providing GladVisor educational products and services. All CFA material is proprietary or licensed, therefore I agree not to duplicate any literature, content, media, or marketing aids except for GladVisor activities. I understand that CFA's materials are copyrighted and subject to protections and remedies under federal copyright law. Costs of reproduction or transmission shall not be reimbursed. It is common to ask the church or charity make copies for their participants, when hard copies are provided. Most delivery is expected to be virtual, with no hard copies needed.
9. CFA understands that from time to time, there is benefit in participants having "skin in the game", for one-on-one coaching in the form of a modest fee. CFA may facilitate making a reimbursement fee available on its payment platform, reflecting an arrangement directly between a GladVisor and the paying participant, with CFA retaining an administrative processing amount. Only CFA approved arrangements may be offered by Gladvisors, and must be done with the advance permission of the sponsoring church or charity. CFA will confirm such advance arrangements. It will then be the GladVisor's responsibility to arrange directly with a participant. CFA anticipates this will be an insubstantial component of the GladVisor program. CFA will remit to GladVisors only from amounts collected and only upon confirmation from the participant of completed coaching. CFA has no obligation to seek collection of amounts from any participant, in advance or after a coaching service is provided. All documentation will disclose the direct relationship of the participant and the GladVisor. CFA will issue required documents such as annual 1099's to GladVisors, but will have no other responsibility to the GladVisor for taxes, reporting or compliance.
10. I understand that if my membership relationship as a GladVisor expires or is terminated for any reason, I will no longer present myself as a GladVisor to any church, charity or individual.
11. I understand that I may terminate this Covenant Agreement at any time by sending written notice to CFA at 3390 Auto Mall Drive, Westlake Village, CA, 91362. I agree that CFA may terminate this agreement at any time upon my breach of any of the terms of this Covenant Agreement. CFA may terminate this Covenant Agreement for any reason with 60 days' notice by non-acceptance of my annual renewal application, or by refunding partial member fees. Upon any termination by the company, CFA shall notify me by mail at my last known address as shown in the company records. In the event of termination, I agree immediately to cease representing myself as a GladVisor. CFA reserves the right in its sole discretion to suspend or terminate the GladVisor volunteer program without cause or notice, in whole or in part.
12. I understand that my status as a GladVisor is subject to all of the requirement of maintaining membership in good standing, including maintaining professional credentials, annual renewals, and subject to the approval of CFA. I further understand that CFA in its sole discretion may amend my membership by adding, deleting or changing any terms and conditions of the GladVisor program at any time. Should any amendments result in my no longer being eligible for the GladVisor program, CFA agrees to provide 60 days notice and refund any pro-rata member fees for the remainder of my membership term. Membership terminates automatically upon non-renewal and

non-payment of member fees at the renewal dates. If I am terminated, and wish to re-enroll at a later date, I understand that I will need to re-apply.

13. As a volunteer role, this Agreement shall become binding in honor only, and is not intended to be a legally binding contract between the volunteer and CFA. Neither party intends any employment relationship to be created now or in the future. This Agreement does not create an employer/employee or contractor relationship, agency, franchise, partnership, or joint venture between CFA and the GladVisor.
14. As a member and volunteer GladVisor, I agree to safeguard and promote the reputation of CFA. I agree to refrain from all conduct that might be harmful to such reputation or to the marketing of their training resources to churches and other organizations. I will not misrepresent CFA in any way. I will conduct myself in a professional manner, avoiding all discourteous, deceptive, misleading, unethical, or immoral practices. Although this is an agreement binding in honor only, I acknowledge that both CFA and I maintain and retain all of our respective rights and remedies under the law to protect property, reputation, ethics and integrity.
15. This Agreement shall be construed and governed under the laws of the State of California.