

Becoming A GladVisor: Guidelines



Experience and Expertise

GladVisors present financial/estate oriented education and coaching. For this reason, GladVisors will have credentials and experience as a financial/legal advisor, such as RIA, CFP, CPA, Trust/Estate attorney, or charitable gift planners. You don't have to be a content expert in technical aspects of charitable planned gifts or estate planning. We're here for that!



References and Nomination

CFA's approach is based on Biblical principles and Christian service. GladVisors will be active members of a Christian church or faith community and profess a Christian Statement of Faith generally consistent with CFA. Please provide references from your current church, in addition to your professional credentials, expertise and experience.



Role

As a GladVisor, it is helpful for participants to understand your experience and expertise. However, GladVisors should not be marketing or soliciting for other professional services. GladVisors agree to professional ethics, non-solicitation, and to use only CFA branded and approved education resources when serving in this capacity.



Approval

CFA will review your application and references, and talk with you. We will approve each applicant at CFA discretion. GladVisors can be confident that peers are mature and active in Christian faith, have experience, expertise and credentials, and maintain the highest integrity, as a neutral, volunteer resource.



Volunteer

Churches and charities often invite volunteers to provide education outreach. CFA is offering this program to equip professionals who are willing to volunteer in educational outreach. CFA does not compensate GladVisors. The program is a means to equip you to become a volunteer in encouraging stewardship education efforts at your church or Christian charities.



Support

CFA will provide orientation training, and regular community/coaching calls. A curriculum on a web-based secure dashboard will be available, with convenient access to resources, curriculum, and links. There will be a public web page for each Gladvisor. Additional marketing materials will be available, based on the needs of GladVisors and the requests of church and community settings.