



SOCIAL VENTURE PARTNERS
ARIZONA

PARTNER INVESTMENT AGREEMENT

The undersigned hereby agrees to become a Partner in Social Venture Partners Arizona by completing this form and returning it, along with investment contribution, to SVPAZ at 1505 E. Missouri Ave., Suite 200, Phoenix, AZ 85014.

TYPE OF MEMBERSHIP: *(Please print as you would like to be listed on our partner directory)*

Individual. Name _____

Couple. Names _____

If couple, please circle if spouse will be actively participating or participating in social events only.

Children (names & ages): _____

Home Address _____

Home Phone _____

Home email _____

Cell _____

PARTNER WORK INFORMATION:

Company _____

Title _____

Address _____

Phone _____

Fax _____

E-mail _____

Please circle: Employed FT / Part-time / Retired

Industry _____

(e.g. Real Estate, Legal, Academia, etc.)

Birthday _____

SPOUSE WORK INFORMATION:

Company _____

Title _____

Address _____

Phone _____

Fax _____

E-mail _____

Please circle: Employed FT / Part-time / Retired

Industry _____

Birthday _____

I prefer to have e mail communications sent to (circle as applicable) home business.

I prefer to have fax communications sent to (circle as applicable) home business.

I prefer to have mailed communications sent to (circle as applicable) home business

AMOUNT OF ANNUAL INVESTMENT CONTRIBUTION PER INDIVIDUAL OR COUPLE

(minimum of \$5,500 per year for two years) \$ _____

METHOD OF PAYMENT (complete as applicable)

Check in the amount of \$ _____ is enclosed.

Payment to be made in _____ installments of \$ _____ each, beginning _____, and thereafter on the following dates: _____

Other method of payment (please specify). _____

Please make all checks payable to "Social Venture Partners Advised Fund at the Arizona Community Foundation." For contributions of stock or fund transfers, please call Sharon Ellis at The Arizona Community Foundation (602-381-1400) for transfer instructions. The Arizona Community Foundation is a private, nonprofit organization, tax-exempt under Section 501(c)(3) of the Internal Revenue Code and all Subscription Contributions are tax-deductible.

Please Tell Us About Yourself...

How did you hear about SVP Arizona? _____

What do you hope to gain from your experience as a partner of SVP Arizona?

What level of involvement would you feel comfortable with during the next year?

- A. A one time contribution. (A few hours doing a discrete task such as participating in an event, reviewing a document, etc.)
- B. One project (A project that may require several hours of time over several weeks such as developing a website, conducting a training, etc.)
- C. On-going periodic. (Something that might require a quarterly or monthly meeting, such as assisting with marketing or fundraising or serving on investment committee).
- D. On-going regular. (Serving on a board, being a mentor/tutor, etc.)
- E. Attending social events.
- F. A financial contribution only. (Partnership dues)

If you answered A-D, what sort of time commitment would you be willing to make? (Please indicate a number of hours per week or per month, or a number of hours for a one-time commitment)

For SVP AZ events, which of the following times is most convenient for you? (Please circle one from group A and one from group B)

- A. Morning hours Lunch hours Evening
- B. Weekdays or Weekends

If you are not able to volunteer right now, do you hope to become more involved in the future?

Briefly describe past and present volunteer or non-profit activities, including board membership: _____

Briefly describe your professional background (or attach a resume if you prefer):

Briefly describe some of your hobbies, interests, and passions: _____

List any other, previously unmentioned, skills (i.e.: fluency in a language, etc.):

What are your areas of personal, philanthropic, and social interest?

How would you like to volunteer? What kind of skills and expertise would you like to offer? (Check as many as appropriate, underline applicable subfields, and elaborate if necessary).

_____ Strategic Planning (management consulting, organizational assessment, expansion planning, meeting facilitation, reporting/ data management, developing evaluation frameworks, program planning)

_____ Human Resources (employee performance and evaluation, personnel policies, internal communications, organizational structure, volunteer management)

_____ Leadership Development / Executive Coaching

_____ Information Technology (database development, database design, hardware, networking, technology assessment, training, website development and design).

_____ Finance and Accounting (Accounting, audits, cost accounting, finance/budget/reporting).

_____ Fund Development (capital campaigns, donor cultivation, event planning, fund development strategy, grant writing, planned giving)

_____ Board and Governance (board members and recruitment, board roles and responsibilities, board structure, governance models)

_____ Legal (legal, contracts, employment, incorporation, insurance, intellectual property, real estate)

_____ Marketing and Communications (graphic design/layout, internal communications, market research and analysis, media training, planning and strategy, PR, public speaking training, video production, writing/editing)

_____ Retail

_____ SVP Committee (Investment, Partnership Development, Finance, Marketing & Communication)
If, yes—which committee: _____

_____ Other (please describe):

Optional Information

What other SVP partners (if any) do you know?

Do you know of anyone who might be interested in learning more about SVP Arizona?

| <u>Name</u> | <u>Organization</u> | <u>Address</u> | <u>Phone</u> | <u>Email</u> |
|-------------|---------------------|----------------|--------------|--------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |