



## FAF Formal Representative/Philanthropic Advisor Guidelines

### Requirements

- The representative has been formally designated by the recommending FAF principal/funder and approved by FAF's Executive Director.
- The representative is compensated and employed by the recommending principal/funder.
- The representative is not funded by or representing other FAF members.
- The representative discloses any COIs or other FAF members they represent.
- The representative commits to not taking on new FAF clients or fundraising within FAF.

### Process

- **FAF Representatives:** A FAF principal/funder may designate up to 3 individuals as their formal representative(s) to FAF's Executive Director over email. The representative(s) will serve as 3 of the entity's 4 allowed representatives within FAF. The representatives are on the FAF email list and slack, are invited to monthly calls.
- **FAF Representatives at events:** A FAF principal/funder can have up to 3 formal representatives attend in-person FAF events like the annual retreat or dinners during conferences.
- FAF's Executive Director has discretion to check for COIs or other concerns regarding the representative.

### FAF Member Retreat Attendance Guidelines

- A **principal's family members** (including partners) are welcome to join the retreat.
  - We strongly encourage the principal to attend 1 retreat first, so they know what they are inviting their family to attend.
  - Philanthropic advisors' family members **do not** qualify to attend the retreat.
- **Informal FAF representatives** designated by a FAF member
  - FAF staff will consider this on a case-by-case basis in exceptional cases but generally, the retreat is for formal FAF members only.
    - Considerations:
      - Maintain a strong incentive for principals to attend and watch out for too many representatives and fewer principals
      - Concern with changing the nature of discussions for members if new and different people rotate in and out
- **Prospective members/funders** will be considered on a case-by-case basis with strong preference for UHNW prospects..
  - Criteria:
    - Strong preference for principals vs. staff



- Sincere intention to reach/exceed FAF giving level in the next 1-2 years
- A prospect can only attend 1 retreat as a prospect
- FAF will likely invite to opening dinner + some portion of the retreat vs full retreat