



MASSACHUSETTS 9/11 FUND

Volunteer Form

Please fill out and fax to 508-879-4888

Name _____

Firm Name _____

Address _____

Telephone _____ Fax _____

e-mail _____

Qualifications CFP CPA ChFC CLU

Areas of Specialization _____

(attach biography if available) _____

The Massachusetts 9/11 Fund will review this information and qualified individuals will be included in a list of volunteers for victims and their families. FPA of Massachusetts members are required to meet the following criteria: Volunteers rendering financial advice are required to be a CFP, CPA, ChFC, or CLU to participate. They should have adequate experience in estate and other financial matters. They are required to have adequate insurance and/or errors and omission coverage and agree not to be compensated in any way by a victim or their family during the period they are a volunteer. If selected by a victim, the volunteer agrees to provide pro-bono services up to the lesser of 12 months or 60 hours. As with any engagement, issues could be resolved at one meeting or could require several meetings or analyses.

I have read the requirements for becoming a volunteer for victims of the 9/11 tragedy and agree that I am qualified and will follow the requirements put forth.

Signature

Printed Name