

# Charter Builder Trust Fund



**CBT Information &  
Donation Form**

Charter Builder Trust  
PO Box 1502  
Columbia, SC 29202  
[www.naifasc.com](http://www.naifasc.com)

## **CBT Board Members 2018 - 2019**

**Donald Wingate - Chair**  
NAIFA-Upstate

**Nanette Piccirillo**  
NAIFA – Charleston

**Mike Riffenburg**  
NAIFA-Upstate

**Jerry Latta**  
NAIFA-SC – Immediate Past  
President

**Gerry Cieluch**  
NAIFA-Upstate

**Madison Dye**  
NAIFA-Midlands

**Ashley Hunter**  
NAIFA Executive Director

**Brad Tapscott**  
Financial Advisor

**Maria Tobin**  
NAIFA- Upstate

# The Purpose of the CBT

Formed in 1968, the purpose of the CBT is to support educational opportunities for NAIFA-SC.

Members donated to the CBT to help offset the cost of educational opportunities and offer educational benefits.

The SCALU building, located at 1914 Park Street, downtown Columbia, was leased out with the benefits going to the CBT along with the proceeds along with its ultimate sale in 1996.

Since that time many members have benefited from the educational opportunities afforded to them by the CBT, meetings can featured renowned speakers of CE, motivational, and even those to help with sales. In additional, NAIFA-SC sponsors a portion of the tuition of the life in leadership Institute (LILI) held annually, forming the NAIFA-SC Leaders of tomorrow.

If you are interested in learning more about NAIFA-SC and the CBT fund, please let us know. We gather speaker information, help sponsor events and are always looking for volunteers.



# Consider Donating

The Charter Builder Trust Fund needs your financial support in order to continue to support NAIFA-SC. Monetary donations go directly to support (continuing) educational opportunities provided for in our industry.

You may also honor a loved one with a memorial or tribute for the person.

Simply complete the attached information and mail to:

**Charter Builder Trust Fund  
PO Box 1502  
Columbia, SC 29202**

**Or you can email it to NAIFA Executive Director, Ashley Hunter at [ahunter@mpastrategies.com](mailto:ahunter@mpastrategies.com).**

All gifts are income tax purposes to the extent of the law. The Charter Builder Trust Fund is an IRS-certified, non-profit, 501 (c) (3) entity. Our tax identification number is 57-6060100.

# Consider Donating

Name \_\_\_\_\_  
\_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

City \_\_\_\_\_ SC

Phone \_\_\_\_\_  
\_\_\_\_\_

Email \_\_\_\_\_  
  
In Honor of/In Memory of  
\_\_\_\_\_

Payment: Check/ Credit Card

Card # \_\_\_\_\_

Expiration \_\_\_\_\_ CVV \_\_\_\_\_

Signature \_\_\_\_\_