



HOW TO BE RECOGNIZED AS A TRUSTED CHARITABLE ADVISOR

Advisors will complete three core workshops to be recognized as a Trusted Charitable Advisor by the Jewish Community Foundation. To maintain recognition, a meeting with Foundation staff or attendance at one Professional Advisor event annually will be required.

PARTICIPATION COST: \$180

For more information or to register, please contact the Jewish Community Foundation:

info@jcsandiego.org • (858) 279-2740

www.jcsandiego.org/PAC

Classes beginning soon.

Program Presented By
 Jewish Community Foundation
San Diego

WHO WE ARE



The Jewish Community Foundation

partners with individuals, families and community organizations to help them achieve their philanthropic goals.

The Foundation manages over \$300 million in assets and has facilitated more than \$1 billion in grants since 1967. The Foundation is a national model for community and individual endowment building and youth philanthropy programs.

PARTNERING WITH ADVISORS

The Foundation has a long history of working with Attorneys, Accountants, Financial Advisors and Wealth Managers.

We provide advisors with tools to engage clients in charitable conversations to enhance their relationships. The result will be stronger, more sustainable and effective nonprofits that will serve our community for generations to come.

PROFESSIONAL ADVISOR RESOURCES

- ✓ Dedicated Advisor Web Page
- ✓ Presentations at Your Firm
- ✓ Charitable Gift Projections
- ✓ Nonprofit Research for Clients
- ✓ Monthly Newsletter on Charitable Trends
- ✓ Participation in client or family meetings



A network of trusted San Diego professional advisors dedicated to integrating charitable planning as a strategy for achieving clients' overall goals and building relationships

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TRUSTED CHARITABLE ADVISOR (TCA) PROGRAM



BENEFITS

The Foundation has always partnered with the San Diego professional advisor community. As part of our ongoing commitment we are pleased to offer the Trusted Charitable Advisor program. It provides unique opportunities to enhance client relationships through charitable conversations.

Lunchtime workshops are presented in an intimate environment. Professionals advisors meet with knowledgeable Foundation staff and colleagues with a similar approach to strengthening client relationships.

- ✓ Attendance at three Trusted Charitable Advisor luncheon workshops annually
- ✓ Recognition as a Trusted Charitable Advisor in Foundation publications and website
- ✓ Obtain customized materials for your firm to lead charitable conversations
- ✓ Connect with other charitably-minded advisors
- ✓ Learn about emerging trends in philanthropy
- ✓ Enhance skills in charitable planning
- ✓ Receive a complimentary ticket to the Annual Professional Advisor Event

WORKSHOP SUBJECTS

LANDSCAPE OF PHILANTHROPY

- Why is philanthropy different today?
- How has technology influenced giving?
- What can we expect in the next decade?
- Who are the next generation of givers?

LISTEN AND LEARN

- Philanthropy in your practice
- Developing a dialogue of trust
- Being a good listener for charitable triggers
- Creating relationships through stories

INSPIRE AND ENGAGE

- Language of philanthropy
- Multi-generational family meetings
- Charitable giving vehicles and options
- Planned giving conversations

PLEASE NOTE: Additional topics and optional workshops may be offered throughout the year.



ANNUAL PROFESSIONAL ADVISOR EVENT

The Jewish Community Foundation offers a high-level technical event annually for advisors to learn new developments in charitable planning and keep up to date on relevant law. This workshop is open to all advisors and typically offers continuing education credit for attorneys, accountants and financial advisors.

