

*The Jewish Community Foundation is pleased to announce the introduction of our Speaker Series for Professional Advisors - Discoveries in Charitable Giving. Please feel free to share the following invitation with your professional advisors, and please let me know if you have any questions. We welcome your participation!*



## DISCOVERIES IN CHARITABLE GIVING

### A SPEAKER SERIES FOR PROFESSIONAL ADVISORS

This speaker series is presented by the Professional Advisor Council of the Jewish Community Foundation of San Diego to educate advisors from the legal, accounting, insurance, wealth management, and investment fields on important issues in estate planning and charitable giving. The goal of the series is to help enhance the services you provide to your clients.

Join top industry professionals for complimentary sessions on the latest trends in planned giving and philanthropy.

### Part One:

## Current Developments in Planned Giving and Wealth Preservation

Featuring:

- Jenny Hill Bratt, Esq., DLA Piper
- Gretchen T. Shaffer, Esq., DLA Piper
- Ellen H. Whelan, Esq., DLA Piper
- Marjory Kaplan, President and Chief Executive Officer,  
*Miriam and Jerome Katzin Presidential Chair, Jewish Community Foundation of San Diego*

**Please select one date below, topics are the same.**

DLA Piper  
**Wednesday, May 4, 2011**  
11:30 am - 1:30 pm  
4365 Executive Dr  
Suite 1100  
La Jolla, CA 92121

Leichtag Family Foundation/Jewish  
Community Foundation North  
**Wednesday, May 11, 2011**  
11:30 am - 1:30 pm  
5800 Armada Dr, Suite 100  
Carlsbad, CA 92008

Program is 11:30 am - 1:30 pm  
**Lunch will be served.**

- **MCLE credit is available.**
  - **CPE credit is available for CPA's.**
  - **CFP continuing education credit pending approval by CFP Board.**
- Additional series dates and topics to be announced.

Please RSVP to Brooke Truesdale at 858-279-2740 or [brooke@jcfsandiego.org](mailto:brooke@jcfsandiego.org)  
by Thursday, April 28. **Space is limited.**

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Since 1967, the Jewish Community Foundation has partnered with individuals, families and community organizations to help them achieve their philanthropic goals and to increase current and future support for a vibrant and secure Jewish community in San Diego, Israel and around the world.

Visit the Jewish Community Foundation at [www.jcfsandiego.org](http://www.jcfsandiego.org) or call 858-279-2740.

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