



Celebrating our Past.
Inspiring the Future.

Who We Are

Since 1967, the Jewish Community Foundation of San Diego has engaged, educated and inspired generations of givers throughout the Jewish and secular communities.

Celebrating its 50 year anniversary, the Foundation manages over \$350M in assets and has facilitated more than \$1B in grants.

The Foundation is a national model for community and individual endowment building and youth philanthropy programs.

Partnering with Advisors

The Jewish Community Foundation of San Diego has a long history of working with Attorneys, Accountants, Financial Advisors and Wealth Managers, providing them with tools to engage their clients in charitable conversations to enhance their relationships.

Professional Advisor Resources

- Dedicated Advisor Web Page
- Presentations to your firm
- Charitable gift projections
- Nonprofit research for clients
- Monthly newsletter on charitable trends
- Participation in client or family meetings



 **TRUSTED**
CHARITABLE ADVISOR

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

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

Sharleen Wollach
Vice President, Operations
sharleen@jcfsandiego.org / (858) 279-2740

jcfsandiego.org/PAC

Program Sponsored By:

 **Jewish Community Foundation**
San Diego

 **Jewish
Community
Foundation**
San Diego



Benefits

The Foundation offers the Trusted Charitable Advisor (TCA) program to advance charitable planning and to further strengthen our partnership with the San Diego professional advisor community.

Over lunchtime workshops, professional advisors meet and learn from philanthropy professionals and colleagues to discuss approaches to strengthening their client relationships.

Program Highlights:

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



Giving.
A way of life.

Workshop Topics

The Philanthropic Landscape



- 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

Annual Professional Advisor Event

The Jewish Community Foundation offers an annual high-level event for advisors to learn about 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.

How to be recognized as a Trusted Charitable Advisor

Complete three core workshops presented by the Jewish Community Foundation. To maintain recognition, a TCA must meet with Foundation staff or attend at least one Professional Advisor event annually.

Program Dates:

All of the workshops will be held at the Jewish Community Foundation from 12:00 to 2:00 pm.

The Philanthropic Landscape:

Tuesday, May 15, 2018

Listen and Learn:

Wednesday, July 11, 2018

Inspire and Engage:

Thursday, August 16, 2018

Participation Cost: **\$180**

tze·da·kah:

Following the Jewish tradition of *tzedakah*—giving with compassion and empathy—we empower our donors to follow their philanthropic passions, build community and leave the world a better place.