



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

Individuals can make a difference;  
together we change the world.

### Who We Are

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

The Foundation manages over \$850M in assets and has facilitated more than \$2.2B in grants.

JCF serves as a national model for community and individual endowment building and youth philanthropy programs.



(858) 279-2740 / [jcsandiego.org/TCA](http://jcsandiego.org/TCA)

### Partnering with Advisors

The Jewish Community Foundation 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 at advisors' firms
- Charitable gift projections
- Nonprofit research for clients
- Participation in client or family meetings

## Benefits

**Now in its 9th year!** The Foundation offers the Trusted Charitable Advisor (TCA) program to advance charitable planning and 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** four Trusted Charitable Advisor luncheon workshops
- **Recognition** as a Trusted Charitable Advisor in Foundation publications and website
- **Receive** 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** complimentary tickets to the Annual Professional Advisor Event and TCA Happy Hour for all graduates

## 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?



### Philanthropy in Your Practice

- Developing a dialogue of trust
- Being a good listener for charitable triggers
- Creating relationships through stories
- Understanding High Net Worth individuals and families



### Charitable Giving Solutions

- Charitable giving vehicles and options
- Understanding philanthropy and the law
- Leveraging tax advantages
- Bridging charitable tax and estate planning



### Creative Legacy Planning

- How planning enhances client relationships
- Engaging with the 'Modern' Family
- Getting the legacy conversation started
- Becoming a charitable ambassador



Giving  
A way of life.

## Workshop Details

All workshops include catered lunch, are from 12:00 noon to 2:00 pm, and held in-person at the Jewish Community Foundation. CFP® credit will be offered.

### The Philanthropic Landscape

Wednesday, May 28, 2025

### Philanthropy in Your Practice

Wednesday, June 25, 2025

### Charitable Giving Solutions

Wednesday, August 20, 2025

### Creative Legacy Planning

Wednesday, September 17, 2025

## Annual Professional Advisor Event

The Jewish Community Foundation offers an annual high-level event to learn about new developments in charitable planning. This luncheon is open to all professional advisors and typically offers continuing education credit for Attorneys, Accountants, Financial Advisors, and Wealth Managers.

## How to be recognized as a Trusted Charitable Advisor

Complete the 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.

Participation Cost: **\$180**

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

### Sharleen Wollach

Executive Vice President and Chief Impact Officer  
[sharleen@jcfsandiego.org](mailto:sharleen@jcfsandiego.org) / (858) 279-2740

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 Jewish Community Foundation  
San Diego

4950 Murphy Canyon Road, San Diego, CA 92123