

Now in its  
**10<sup>th</sup>**  
year!



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 \$975M in assets and has facilitated more than \$2.4B 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



Giving  
A way of life.

**Benefits**

**Now in its 10th 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

**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



**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**

Tuesday, June 23, 2026

**Philanthropy in Your Practice**

Wednesday, July 8, 2026

**Charitable Giving Solutions**

Thursday, August 13, 2026

**Creative Legacy Planning**

Thursday, September 24, 2026

**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**

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

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