

ABOUT JCF

Founded in 1949, the Jewish Community Foundation of Greater MetroWest NJ (JCF) is the largest public community foundation in New Jersey. As the planned giving and endowment arm of Jewish Federation of Greater MetroWest NJ, JCF manages over \$470 million in assets and has facilitated over \$40 million in grants, this year alone.

JCF is a national model for community and family endowment building, working with donors to fulfill their cherished values of *tzedakah* (charity) and *tikkun olam* (repairing the world) by guiding and empowering them through thoughtful and strategic philanthropy.

Throughout its long history, JCF has been committed to working with attorneys, accountants, financial advisors, wealth managers, and insurance professionals, by providing tools and guidance on how to engage their clients in a charitable conversation, enhancing relationships, and, most recently, on next generation client success.

JCF CAN PROVIDE YOU WITH...

- ▶ customized philanthropic solutions that meet your clients' needs
- ▶ alternatives to a private foundation
- ▶ customized presentations for your firm
- ▶ charitable giving projections
- ▶ nonprofit research for clients
- ▶ charitable resource guides and materials
- ▶ consultation in client or family meetings
- ▶ the option to suggest a personal investment manager for funds of \$1 million+



Jewish Community
OF GREATER
Foundation METROWEST NJ

Headquarters:

901 Route 10, Whippany, New Jersey 07981

Regional Office:

1391 Martine Avenue, Scotch Plains, New Jersey 07076
(973) 929-3113 • www.jcfmetrowest.org



PROFESSIONAL ADVISOR NETWORK

THREE-PART SEMINAR

Earn CPE/CLE credits

Cost: \$180

Kosher breakfast included

To register for the seminar as well as to read speaker bios and learn more about the PAN advisory council, visit

WWW.JCFMETROWEST.ORG/PAN

For more information contact

Yaffa Karp, Senior Development Officer,
at ykarp@jfedgmw.org or (973) 929-2982.



Jewish Community Foundation
OF GREATER METROWEST NJ

presents a
three-part seminar on

INTERGENERATIONAL PLANNING

This seminar will provide financial professionals with tools and strategies to help you engage your clients in meaningful conversations about the powerful impact of multigenerational philanthropy.

JEWISH COMMUNITY FOUNDATION AND 21/64

JCF is dedicated to keeping up with the newest trends in order to best serve the philanthropic needs of our many donors. As donors anticipate transferring their wealth to their children and grandchildren, they are understandably concerned about how to also transfer their legacy of charitable giving. To best advise them in this area, we have partnered with 21/64, an independent nonprofit practice specifically providing multi-generational advice, facilitation, and training for next generation engagement, especially within family philanthropy and other family enterprises.



Sharna Goldseker
Executive Director



Danielle Oristian York
Managing Director

Established in 2002 from a program with the Andrea & Charles Bronfman Philanthropies, 21/64 is considered an industry leader in the field of next-gen philanthropy. Executive Director Sharna Goldseker, Managing Director Danielle Oristian York, and the entire 21/64 team of experienced advisors specialize in serving families with funds, foundations, or other family enterprises, as well as wealth and philanthropy advisors—helping multiple generations work, give, and serve together more effectively. Throughout this seminar, Sharna and Danielle will provide you with the customized, field-tested strategies, tools, and resources you need to build stronger relationships with your clients by talking about what's most important to them.

INTERGENERATIONAL PLANNING THREE-PART SEMINAR

Part 1: The Charitable Landscape and Multigenerational Awareness

Facilitated by Sharna Goldseker, 21/64

Introduction by JCF Board of Trustees members Jerome Deener of Fox Rothschild and Anita Siegel of Siegel & Bergman

Date: November 1, 2018, 8:30 – 10 a.m.

Venue: Lowenstein Sandler, Roseland, NJ

Part 2: Next-Gen Donor Trends and Impact Giving

Facilitated by Danielle Oristian York, 21/64

Introduction by Bruce Mantell of Mantell & Prince

Date: December 4, 2018, 8:30 – 10 a.m.

Venue: Wiss & Company, Livingston, NJ

Part 3: The Art of Asking Great Questions

Facilitated by Sharna Goldseker, 21/64

Introduction by JCF Investment Committee Chair Peter Langerman of Franklin Mutual Advisors

Date: January 8, 2019, 8:30 – 10 a.m.

Venue: CohnReznick, Roseland, NJ

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SEMINAR HIGHLIGHTS

- ▶ Build stronger relationships with your clients through directed conversations about their philanthropic goals
- ▶ Develop techniques and tools to retain your clients' next generation family
- ▶ Earn CPE/CLE credits, 1 per class
- ▶ Gain hands-on experience
- ▶ Assemble a set of comprehensive materials on how to lead charitable conversations
- ▶ Network with other charitably minded advisors
- ▶ Receive online recognition as a graduate of the Intergenerational Planning Seminar by attending all three classes.
- ▶ Maintain online recognition by attending one JCF event per year. The fee will be waived for the first JCF event you attend after completion of the seminar.

