

**Professional Advisory Group (PAG) Registration Form**

# By joining the Jewish Foundation’s professional advisory group, I agree to:

* During the planning process, inquire as to whether my Jewish clients have considered making gifts to charitable organizations, synagogues or schools;
* Discuss with them the tax benefits of charitable giving;
* Discuss ways the Foundation may be able to help simplify their giving and achieve their charitable objectives; and
* When appropriate, call upon the Jewish Foundation to work with me and my Jewish clients who have indicated an interest in including philanthropy in their financial and estate planning.
* I affirm that I am in good standing within my profession’s oversight organization (i.e. Board of Professional Responsibility, etc.

Name:

Address:

City, State Zip:

Phone/Fax: /

E-mail:

Professional designation (J.D., C.P.A., F.P., etc.) :

Firm name:

# Please return this form via e-mail to Kellie Smith at [kelliek@jewishjacksonville.org](mailto:kelliek@jewishjacksonville.org) or mail to The Jewish Foundation of Northeast Florida, 8505 San Jose Blvd. Jacksonville, FL 32217