

2019-2020 Professional Advisory Committee (PAC) Highlights

PROFESSIONAL ADVISORS AWARD OF EXCELLENCE RECIPIENT: MEIR J. ROTENBERG



The Professional Advisors Award of Excellence honours professionals who encourage their clients to consider charity as part of their estate or financial planning process. Meir J. Rotenberg, VP & Investment Advisor, TD Wealth Private Investment Advice, is an ardent ambassador and champion of the Jewish Foundation and this year's most deserving award recipient.

1 in-person seminar, 2 networking events,
3 specialty webinars for advisors,
9 co-hosted webinars with UJA Federation:

15 EVENTS



Estate Planning in Unprecedented Times

MARNI PERNICA, PARTNER, AIRD & BERLIS LLP
BRITTANY SUD, ASSOCIATE, MILLER THOMSON LLP



Breakfast with the Jewish Foundation

AVERY SHENFELD, MANAGING DIRECTOR AND CHIEF ECONOMIST,
CIBC CAPITAL MARKETS



Making Tax Lemonade - Tax Planning in Recessionary Times: Creating Liquidity out of Losses

MICHAEL GOLDBERG, PARTNER, TAX, MINDEN GROSS LLP



COVID-19 Tax Update

DOV BEGUN, PARTNER, TAXATION, OSLER, HOSKIN & HARCOURT LLP
JAMIE GOLOMBEK, MANAGING DIRECTOR, TAX AND ESTATE PLANNING,
CIBC PRIVATE WEALTH MANAGEMENT

400+

Professional advisors
engaged through
various programming



2019 & BEYOND: Economic, Estate, Tax & Insurance

BENJAMIN TAL, DEPUTY CHIEF ECONOMIST, CIBC CAPITAL MARKETS
FELICE KIRSH, PARTNER, SCHNURR KIRSH OELBAUM TATOR LLP
SILVIA JACINTO, PARTNER, CROWE SOBERMAN LLP
HEMAL BALSARA, AVP REGIONAL TAX, RETIREMENT AND ESTATE PLANNING SERVICES, MANULIFE FINANCIAL