



Professional Advisory Group

The mission of the Jewish Foundation is to encourage charitable giving, support partner agency endowment development and to build and sustain a vibrant Jewish community.

The Foundation staff and leadership work closely with local financial and estate-planning professionals through its Professional Advisory Group (PAG) to achieve its mission. The purpose of the PAG is to encourage professional advisors to promote the Foundation's mission and the concept of charitable giving to their Jewish clients when it is appropriate to do so.

As a member you are asked to:

- Inquire as to whether your Jewish clients have considered making gifts to charitable organizations, synagogues, or schools during the planning process;
- Discuss the tax benefits of charitable giving with them;
- Tell clients about the ways the Foundation may be able to help simplify their giving and achieve their charitable objectives; and/or
- Call upon the Jewish Foundation, when appropriate, to work with you and your Jewish clients who have indicated an interest in including philanthropy in their financial and estate plans.

As a member of the PAG, you will receive several benefits, including:

- Information concerning continuing education programs.
- Regular listing in Foundation publications, including the annual report and periodic newsletters.
- Eligibility to serve as a featured speaker at one of the Foundation's outreach programs. These include presentations to "affinity groups", such as synagogue brotherhoods, sisterhoods, senior adult groups, and school PTAs.
- Opportunity to be featured in a Jewish Foundation of Memphis publication for your technical expertise and/or for your role in facilitating a charitable gift to benefit the Jewish community.
- Regular updates on charitable giving legislation, trends in giving, etc.

We hope you will decide to be our partner in promoting charitable giving to secure the future of the Jewish community.

If you are interested in becoming part of our PAG, please contact Larry Schaffer at the Jewish Foundation of Memphis at 901-654-2151 or lschaffer@jcpmemphis.org.