



Professional Advisory Group (PAG) Registration Form

The purpose of the PAG is to encourage local financial and estate-planning professionals to promote the concept of charitable giving to their Jewish clients, when it is appropriate to do so. We will be happy to provide a supply of our written materials for your use with your clients.

By joining the Jewish Foundation’s Professional Advisory Group, I agree to:

- 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.

Signature: _____ Date: _____

Name:
Address:
City, State, Zip:
Phone/Fax:
Email:
Firm Name:
Job Title, including professional designation (J.D., C.P.A., etc.):

Please return this form to Sarah VanderWalde: svanderwalde@jcpmemphis.org or fax to 901.374.0451