

# How Do I Envision My Legacy?

## Professional Advisory Council Community-wide Seminars

Supported by the LIFE & LEGACY Program and the Harold Grinspoon Foundation and the Joe Kraft Professional Advisory Program Fund and the Harris A. and Diane Gilbert Area of Interest Fund for Education housed at the Jewish Foundation

# What is a PAC Seminar?

The Nashville Jewish community has embraced the LIFE & LEGACY™ program encouraging community members to leave after-lifetime gifts which will provide endowment resources to Jewish organizations. The Professional Advisory Council (PAC) seminars provide an opportunity to explore options for formalizing their legacy to Jewish organizations in Nashville. Open to the entire community, these seminars are approximately 1½ hours long and serve to enhance participants' knowledge regarding financial and estate planning, particularly how developing a charitable giving plan fits into your overall financial strategy. PAC seminars are led by PAC members of the Jewish Federation & Jewish Foundation of Nashville and Middle Tennessee with expertise in a relevant subject matter.

# What is the Professional Advisory Council?

The purpose of the PAC at the Jewish Federation is to enhance the knowledge regarding the opportunities for maximizing wealth transfers to families and charity for the Nashville Jewish community.

The information provided at the PAC seminars is for informational purposes only and is not intended as legal or tax advice. Seminar attendees may seek professional advice from a PAC member outside of the seminars. PAC members are not endorsed by the Jewish Federation & Jewish Foundation of Nashville and Middle Tennessee and the PAC with regard to a specific expertise in a particular area of law, tax planning or estate planning.

**PAC members are professionals who are involved in financial and estate planning, law, accounting, life insurance, and investment planning.**

The PAC provides networking opportunities for people in various fields and for young professionals to build a client base and be involved in Jewish Federation activities.

## PAC Charter Members

|                    |                        |
|--------------------|------------------------|
| John Dodd          | Jana Lisle Parham      |
| Adam Dretler       | Eva Pulley             |
| William Eskind     | Randy Ratliff          |
| Gilbert S. Fox III | Rodney Rosenblum       |
| Harris Gilbert     | Howard Safer           |
| David Heller       | Marty Satinsky         |
| Mindy Hirt         | Rachel Schaffer-Lawson |
| Lee Kraft          | Kimbra Spann           |
| Michael Levine     | David Steine           |
| Ralph Levy         | Michael Whitney        |
| Andrew May         |                        |

If you're interested in becoming a PAC member or are currently a PAC member and would like to present at one of our seminars, please contact Shannon Small at [shannon@jewishnashville.org](mailto:shannon@jewishnashville.org) or 615.354.1651

## **PAC Seminar 1: How will the upcoming election affect my financial plan?**

**Thursday, October 15th, 2020 | 12:00-1:30  
pm**

Presenters: John Dodd, Ralph Levy

Panelists: Eva Pulley

Our speakers describe the financial planning process and how to overcome some of the financial problems individuals encounter during their lifetime.

Our speakers talk about the differences in the tax proposals of the presidential candidates.

Discover how financial planning is connected to charitable giving.

## **PAC Seminar 2: Happy New Year! Now what changes do I have to make to my estate and financial plan?**

**Monday, January 25th, 2021 | 12:00-1:30 pm**

Presenters: Howard Safer, David Heller

Panelist: Marty Satinsky

Our speakers define the terms Wills, Ethical Wills, Living Wills, Power of Attorney Trusts, and Healthcare Proxy and discuss the differences, their importance, when they are needed, and the necessary requirements.

Discover the changes you may need to make to your estate planning documents based on the New Year.

## **PAC Seminar 3: All assets are not created equal: Other than cash, what can I use to make charitable gifts?**

**Monday, March 1st, 2021 | 12:00-1:30 pm**

Presenters: Mike Levine, Mindy Hirt

Panelist: Ralph Levy, Eva Pulley

Our speakers review different giving vehicles that can be used for after lifetime gifts, the benefits of each, and how they can be used in a charitable giving plan.

Discover how the Jewish Foundation can play a part in your legacy giving and legacy planning.

## **PAC Seminar 4: Intergenerational Charitable Planning: What's the Plan?**

**Friday, April 9th, 2021 | 12:00-1:30 pm**

Presenters: Eva Pulley, Michael Whitney

Panelists: Kim Spann

Our speakers explain estate planning, assessing the needs of a surviving spouse, children, and other family members, the tools that are used, tax laws, and charitable trusts.

Discover how you can include and involve your family in a charitable giving plan.

To RSVP, please fill out the sign up form: <http://bit.ly/PAC2021>

All PAC Seminars will be virtual until further notice. Lunch will be provided to attendees and will be delivered.

## PARTICIPATING AGENCIES:



HADASSAH



HADASSAH,  
THE WOMEN'S ZIONIST  
ORGANIZATION  
OF AMERICA, INC.



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LIFE & LEGACY™ is a program sponsored by the Jewish Federation & Jewish Foundation of Nashville and Middle Tennessee in partnership with the Harold Grinspoon Foundation which promotes after – lifetime giving to benefit the Nashville Jewish community. For questions about LIFE & LEGACY™, contact Eric Stillman at [eric@jewishnashville.org](mailto:eric@jewishnashville.org)

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Questions? Contact Shannon Small, Financial Resource Philanthropic Officer at [Shannon@jewishnashville.org](mailto:Shannon@jewishnashville.org).