

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 Members

John Dodd	Harry Perret
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	Melisa Silverman
Michael Levine	Lee Slotnik
Ralph Levy	Kimbra Spann
Andrew May	David Steine
Jana Lisle Parham	Michael Whitney

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 or 615.354.1651

Accumulating Wealth in Your 20s and 30s Series

PAC Seminar 1: How do I make a solid financial plan for the future?

Tuesday, October 5, 2021 | 12:00-1:00 pm

Presenters: Marty Satinsky, Adam Dretler
Panelist: Kim Spann

Speakers present on staying out of/getting out of debt, the basics of insurance (property, casualty, disability, and life insurance) and investments.

Discover how you can plan for your financial future.

PAC Seminar 2: I'm still young. What do I need to know about retirement, tax, and estate planning?

Wednesday, March 9, 2022 | 12:00-1:00 pm

Presenters: David Heller, Michael Levine

Speakers describe options for retirement plans as well as tax and charitable planning. They will also define and explain the benefits of estate planning and related documents that are needed at a young age.

Discover the essential details of how to plan for now and your future today and how your financial matters will be handled if you become unable to do so.

Preserving Wealth for the 40+ Series

PAC Seminar 1: What issues will arise as I plan for dealing with my parents' estate as well as my own?

Tuesday, December 7, 2021 | 12:00-1:00 pm

Presenters: Ralph Levy, Mindy Hirt

Speakers present on issues that children encounter when dealing with a parent's estate and in handling a parent's financial matters if the parent become unable to do so. Speakers review tax planning and charitable giving.

Discover how you can plan for your family's future.

PAC Seminar 2: What do I need to know about retirement planning?

Thursday, April 7, 2022 | 12:00-1:00 pm

Presenters: Michael Whitney, Harry Perret, Barbara Moss

Speakers review how to plan for retirement. Speakers describe the ins and outs of long term care policies.

Discover what is needed as you plan for retirement.

PARTICIPATING AGENCIES:



HADASSAH



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



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 more information on LIFE & LEGACY, leaving a legacy gift, and the Professional Advisory Council, please contact Shannon Small at shannon@jewishnashville.org.