Who We Are
At the Jewish Community Foundation Orange County, we seek to create a culture of philanthropy and legacy by empowering individuals to engage in effective, meaningful giving.

Partnering with Advisors
The Jewish Community Foundation Orange County has a long history of working with Attorneys, Accountants, Financial Advisors and Wealth Managers, providing them with tools to engage their clients in charitable conversations to enhance their relationships.

Professional Advisor Resources
- Dedicated Advisor Web Page
- Presentations to your firm
- Resource for charitable gifts
- Nonprofit research for clients
- Participation in client or family meetings

For more information and to register, please contact the
Jewish Community Foundation
Orange County:
Wendy Chase Arenson, J.D., CSPG
Executive Director
wendy@jcfoc.org

A network of Orange County professional advisors dedicated to building relationships and integrating charitable planning as a strategy for achieving clients’ overall goals.
Benefits
The Foundation offers the Recognized Charitable Advisor program to advance charitable planning and to further strengthen our partnership with the Orange County professional advisor community.

Over lunchtime workshops, professional advisors meet and learn from philanthropy professionals and colleagues to discuss approaches to strengthen their client relationships.

Program Highlights:
• Attend three Recognized Charitable Advisor luncheon workshops annually
• Acknowledgment as a Recognized Charitable Advisor in Foundation publications and website
• Develop customized materials for your firm to lead charitable conversations
• Connect with other charitably-minded advisors
• Learn about emerging trends in philanthropy
• Participate in training for enhanced charitable planning
• Invitation to an exclusive annual Recognized Charitable Advisor happy hour

Workshop Topics
The Philanthropic Landscape
• Why is philanthropy different today?
• How has technology influenced giving?
• What can we expect in the next decade?
• Who is the next generation of givers?

Listen and Learn
• Philanthropy in your practice
• Developing a dialogue of trust
• Being a good listener for charitable triggers
• Creating relationships through stories

Inspire and Engage
• Language of philanthropy
• Multi-generational family meetings
• Charitable giving vehicles and options
• Planned giving conversations

Workshop Details:
All of the workshops will be held at the Merage JCC in Irvine, from 12:00 pm to 2:00 pm.

The Philanthropic Landscape:
Session One - January 23, 2020

Listen and Learn:
Session Two - March 12, 2020

Inspire and Engage:
Session Three - May 7, 2020

How to join the Recognized Charitable Advisor program
Complete the three workshops presented by the Jewish Community Foundation Orange County. To remain in good standing, a Recognized Charitable Advisor must meet annually by phone or in person with Foundation staff to discuss charitable planning.

Participation Cost: $180

tze-da-kah:
Following the Jewish tradition of tzedakah—giving with compassion and empathy—we empower our donors to follow their philanthropic passions, build community and leave the world a better place.