

ENGAGE • EDUCATE • INSPIRE

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 advisors' 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:

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Executive Director

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Program designed by:



Program sponsored by:



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RECOGNIZED
CHARITABLE ADVISOR

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 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



Giving.
A way of life.

Workshop Details:

All of the workshops will be held virtually over Zoom.

Session One

The Philanthropic Landscape

Session Two

Listen and Learn

Session Three

Inspire and Engage

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**.