



## Benefits

The Jewish Community Foundation (JCF) is excited to launch the **Trusted Charitable Advisor (TCA) program**, a program of the Jewish Community Foundation of San Diego, to advance charitable planning and further strengthen our partnership with the Southern Arizona professional advisor community.

Over four **breakfast workshops**, professional advisors meet and learn from nationally recognized professionals and colleagues to discuss trends in philanthropy, planned giving, and approaches to strengthening and enhancing client relationships.

## Program Highlights

- **Attend** four Trusted Charitable Advisor breakfast workshops.
- **Be recognized** as completing the Trusted Charitable Advisor program in JCF publications and website.
- **Receive** materials to lead charitable conversations with clients.
- **Connect** with other charitably-minded advisors.
- **Learn** about emerging trends in philanthropy.
- **Participate** in training for enhanced charitable planning.



## Workshop Topics

### *The Philanthropic Landscape*

- Why is philanthropy different today?
- How has technology influenced giving?
- What can we expect in the next decade?
- Who are 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
- Planned giving conversations

### *What You Need to Know*

- Charitable giving vehicles and options
- Understanding philanthropy and the law
- Leveraging tax advantages

## Workshop Details

All workshops include coffee and breakfast from 7:30 am – 9:30 am at the Harvey & Deanna Evenchik Center for Jewish Philanthropy located at 3718 East River Rd, Tucson, AZ 85718.

- **The Philanthropic Landscape**  
Thursday, May 2, 2024
- **Listen and Learn**  
Thursday, May 23, 2024
- **Inspire and Engage**  
Thursday, August 15, 2024
- **What you Need to Know**  
Thursday, August 29, 2024

### How to be recognized as completing the Trusted Charitable Advisor program

Complete all four workshops presented by the Jewish Community Foundation. To maintain recognition, TCAs must meet with JCF staff or attend at least one Professional Advisor event hosted by JCF annually.

**Participation Cost: \$180**