

Professional Advisory Group

PROFESSIONAL ADVISORS PLAY a unique and important role in the development of current and deferred planned charitable gifts. It is often the advisor who links a client's estate planning objectives to a charitable gift. They often help clients make informed decisions about charitable giving. This group is comprised of professionals in the various legal and financial fields related to estate planning. These individuals

assist the Jewish Foundation by promoting charitable giving, by assisting with educational programs, and consulting with and providing direction to the Jewish Foundation regarding technical and estate planning issues. They also advise Jewish clients on the benefits of charitable giving in the context of their estate, tax and financial planning.

Planning

Over the years the Foundation has been a great resource for me and for my clients. As a professional advisor, I have the unique and gratifying opportunity to work with clients who are interested in philanthropy and giving back to the community. The Foundation is a natural partner in this process."

Pictured is CPA Harold Wormser with Laura Linder, Executive Director of the Jewish Foundation of Memphis. Mr. Wormser and other members of the Jewish Foundation's Professional Advisory Group work closely with the

Foundation to educate the community about charitable planned giving and assist Jewish clients in achieving their charitable objectives through meaningful commitments to the Jewish community.

