



# Giving. A way of life.

*tze·da·kah:*

Following the Jewish tradition of tzedakah—giving with compassion and empathy—we empower our donors to follow their philanthropic passion and leave the world a better place.

## About the Workshops

Over a series of workshops during the first year, professional advisors learn new approaches to strengthen client relationships through the introduction or expansion of philanthropic giving. This workshop is a great professional development opportunity and is open to all advisors and may offer continuing education credit for attorneys, accountants, financial and wealth advisors.

The Network of Philanthropic Advisors program was designed by the JCF San Diego and is sponsored by MN JCF.

## Workshop Sessions



### 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
- Charitable giving vehicles and options
- Planned giving conversations

**Program Fee: \$180**

“For me, *the most valuable aspect of the NPA is hearing different approaches to situations* from colleagues.”

NPA Alum

## Becoming an NPA Advisor

To join the NPA, an advisor must complete three core workshops presented by MN JCF in the first year.

To maintain recognition, a member must attend at least one NPA event annually or meet with MN JCF staff.

Visit the MN JCF for registration and a current list of NPA advisors.

## Contact

**Alene G. Sussman**

*MN JCF Executive Director*

agsussman@mnjcf.org  
952-417-2316



## Network of Philanthropic Advisors

A network of trusted Twin Cities professional advisors dedicated to building relationships and integrating charitable planning as a strategy for achieving clients’ overall goals.

## Who We Are

Since 1974, the **Minnesota Jewish Community Foundation (MN JCF)** has engaged, educated, and inspired generations of givers throughout the Jewish and secular communities.

MN JCF manages over \$150M in assets and has facilitated more than \$67M in grants over the past six years.



## Partnering with Advisors

MN JCF has a long history of working with attorneys, accountants, financial advisors, wealth managers, and other professional advisors, providing them with tools to engage their clients in charitable conversations to enhance their relationships.

MN JCF offers the NPA to advance charitable planning and further strengthen our partnership with the Twin Cities professional advisor community.

## Program Membership Highlights

- Three Network of Philanthropic Advisors workshops offered in your first year
- Recognition as a Professional Advisor in MN JCF publications and on our website
- Develop customized materials and charitable gift projections 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
- Receive a complimentary ticket to the annual NPA event for advisors to learn about new developments in charitable planning and stay up to date on relevant laws.