

Adolph & Rose Levis Jewish Community Center Jewish Legacy Advisors Team (JLAT)

Founding Co-Chairs: Stephanie Midler and Aaron Millman

The Adolph & Rose Levis Jewish Community Center is launching a new committee called the Levis JCC Jewish Legacy Advisors Team (**JLAT**). The purpose of this group will be to utilize the talents of the many leaders in our community that are our ardent supporters to better support the Levis JCC and the efforts of the Jewish Federation of South Palm Beach County's Professional Advisory Committee (PAC) that works on behalf of our entire community. We are privileged to have so many dynamic and talented professionals and caring donors that are willing to utilize their skills to secure a brighter future for our Jewish community. Passionate donors, lawyers, financial consultants, estate planners, accountants, and business professionals are called to serve on this committee. It is our hope that each year **JLAT** will grow and thrive, furthering the reach and depth of Jewish philanthropy and our ability to help those in need.

JLAT members work with the Levis JCC professional staff to spread the word about Jewish philanthropic opportunities to their clients, colleagues, family and friends. They then advise prospective donors on a myriad of tax-smart giving opportunities including the establishment of new endowment funds, trusts, bequests, life insurance policies and IRAs.

JLAT members are committed to educating local professionals from a variety of disciplines and community members about planned giving opportunities. They encourage others to promote the concept of planned giving and the benefits of giving back to the community, and they help each other enhance their skills and effectiveness.

JLAT members will also interact with the Jewish Federation of South Palm Beach County (JFSPBC) Professional Advisory Committee (PAC) to better understand and serve the Jewish community in its entirety.

JLAT members will have networking opportunities as well as mentorship relationships that will enhance their personal and professional lives.

Guidelines for Membership

Mission Statement

- **To educate** professionals from a variety of disciplines about planned giving opportunities for clients and to provide them with a forum for networking
- **To encourage** professionals to promote the concept of planned giving and to educate potential donors about the benefits of giving back to the community and to the individual donor.
- **To advance** the mission of the Levis JCC to better serve the community.
- **To provide** opportunities to gain knowledge about their local community and gateways for engagement.

Membership Qualifications

1. Community members engaged with the Levis JCC and/or professionals in good standing as donors, supporters and/or engaged in the field of estate planning as an attorney, accountant, marital & family law attorney, financial advisor, private banker, insurance professional, trust officer, or planned giving professional employed by or consulting with a 501(c)(3).

2. All members of **JLAT** must contribute a minimum annual gift of \$500 to the Levis JCC Annual Campaign.
3. All members of **JLAT** 35 years of age and below must contribute a minimum annual gift of \$250 to the Levis JCC Annual Campaign.
4. Must be committed to the development of the Levis JCC and the Jacobson Jewish Community Foundation of the JFSPBC.
5. Must be a resident of, or practice in the Levis JCC geographic area.

Membership Responsibilities

1. Educate, encourage and solicit clients/potential donors to commit financial resources to the JFSPBC Jacobson Community Foundation to benefit the Levis JCC.
2. Attend **JLAT** meetings.
3. Strongly encouraged to attend at least two Levis JCC sponsored events.
4. Upon request, assist Levis JCC Associate Executive Director, other members of the Committee or donor's counsel with member's expertise through research, advice or consultation.
5. Assist in contacting other professionals to inform them of Levis JCC programs and activities.
6. Encouraged to write an article every year for Levis JCC Publications.
7. Help recruit new members.

Membership Conduct

1. Refrain from using committee membership in public advertising.
2. Avoid soliciting your professional services to donors who have been referred to you for consultation.
3. **JLAT** members shall conduct themselves in a professional, ethical, honest manner at all times.

Jewish Legacy Advisors Team Giving Standards

In order to remain on JLAT, members must be current in their payment of pledges (within one year) or have made arrangements for a payment plan. Consideration should be given to participate in planned giving programs through the Levis JCC including a Donor Advised Fund (DAF), Life Insurance Policy, or an endowment fund.

Thank you

Thank you for your interest in joining the Levis JCC Jewish Legacy Advisors Team (JLAT).

Upon acceptance of these terms, please fill out the membership application and return it to Cindy Bergman, Levis JCC Associate Executive Director. Your application will be reviewed in a timely manner and a membership committee member will contact you shortly.

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Adolph & Rose Levis Jewish Community Center
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