

⊕ Professional Advisors Alliance

The Professional Advisors Alliance (PAA) comprises a group of active and talented charitable gift, estate, and financial planning professionals dedicated to growing philanthropy in Greater Philadelphia according to the teachings of Jesus Christ.



THE CATHOLIC
FOUNDATION
OF GREATER
PHILADELPHIA

Who Can Become a Member

Well-respected and ethical members of the following professions that are active members of their parish community.

- Estate Planning Attorneys
- Tax Attorneys
- Financial Planners/Wealth Advisors
- Trust Officers
- Certified Public Accountants
- Investment Managers
- Insurance Professionals
- Other Interested Allied Professionals

Benefits of Membership

- Expand and nurture your professional network with individuals who share your faith.
- Professional development
- Recognition of your involvement in The Catholic Foundation's online directory and annual report.
- Attract new clients from within the Archdiocese of Philadelphia.
- Hear from local and national speakers on topics related to charitable and planned giving.
- Invitations to annual events.

Contact Us

Garrett Owen, Chief Philanthropy Officer

215-874-3021

gowen@thecfgp.org

Supporting The Foundation's Mission: Member Roles

- Serve as an ambassador for The Catholic Foundation in the larger community. Understand The Foundation's mission and case for support.
- Connect clients to philanthropic resources, as appropriate, including The Catholic Foundation which offers charitable giving tools compliant with Catholic social teaching.
- Serve as a resource to The Foundation's gift planning staff, Board of Directors, and committee volunteers.
- Assist with The Catholic Foundation's educational presentations and workshops on Charitable and Planned Giving, especially as it relates to the member's area of expertise.
- Assist in bringing other professional advisors closer to The Catholic Foundation. Nominate new members to join and/or attend events.
- Regularly attend Alliance meetings (2-3 per year), which will feature mission-related topics, and information about the Alliance, and offer professional development. Assist with hosting meetings, if possible.
- Give personal philanthropic support to The Catholic Foundation.

thecfgp.org

2133 Arch St. Suite 400 | Philadelphia, PA 19103