

# *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

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## 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](http://thecfgp.org)

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