



OJCF  
Professional  
Advisors Group

## Professional Advisors Group (PAG) Membership Application

Name: \_\_\_\_\_

*(Include your credential, license, or title, as you would like it to appear on OJCF's website and printed materials.)*

Profession:

- Accountant
- Attorney
- Financial/Wealth Advisor
- Insurance Professional
- Private Banker
- Trust Officer

Practice Area: \_\_\_\_\_

Number of Years Working in the Field: \_\_\_\_\_

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### **Member Sponsorship**

We want to make PAG membership accessible to all who are interested, so there is no membership fee. We depend on the generosity of our members to donate to PAG and to sponsor our events. Please make a donation to OJCF's PAG fund and/or email [nadineg@ojcf.org](mailto:nadineg@ojcf.org) to inquire about upcoming sponsorship opportunities.



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## Membership Guidelines

Enclosed are the guidelines for PAG membership. Please sign below to indicate your acceptance of these terms and return this application via email or mail to Nadine Gartner at the address below. Your application will be reviewed in a timely manner, and you will be contacted shortly.

Oregon Jewish Community Foundation  
Attn: Nadine Gartner, Director of Outreach  
1618 SW First Avenue, Suite 350  
Portland, OR 97201  
[nadineg@ojcf.org](mailto:nadineg@ojcf.org) | 503-743-6006

*I certify that I accept the requirements to be considered for membership in the Professional Advisors Group and will adhere to the qualifications and responsibility as a member.*

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Signature

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Date



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### Membership Benefits

- Connect, network, and learn at free PAG member events all year.
- Appear in the PAG directory on the Oregon Jewish Community Foundation's (OJCF) website where potential clients search for professional advisors like you.
- Receive free resources from OJCF that support your philanthropic conversations with clients.

### Membership Qualifications

- Professionals in good standing, dedicated to serving their clients as an accountant, attorney, financial or wealth advisor, insurance professional, private banker, or trust officer.
- Must be committed to the development and growth of the OJCF.

### Membership Responsibilities

- Educate and encourage clients/potential donors to work with OJCF.
- Attend PAG events.
- Assist OJCF's professional team with your expertise as desired.
- Promote OJCF and PAG to your colleagues and other professional advisors.

### Membership Conduct

- Refrain from using PAG membership in public advertising. You may include your membership in biographical/professional profiles.
- Be a *mensch*. Always conduct yourself in a professional, ethical, and honest manner.
- Do not solicit your services to PAG members or email blast them.

**If you or your firm would like to sponsor future PAG events, please contact Nadine Gartner, OJCF's Director of Outreach, at [nadineg@ojcf.org](mailto:nadineg@ojcf.org).**