



# PHILANTHROPY IS GOOD BUSINESS.

Advisors Philanthropy Initiative (API) is a networking division of the Jewish Federation of Broward County where professionals come together to connect, learn, and impact our community.

API is comprised of professionals in Tax, Estate Planning and Financial Planning disciplines.

API's mission is simple— to promote philanthropic discussions and giving from financial advisors to the Jewish Federation of Broward County.

Our goal is to create partnerships within the professional community that can motivate potential donors to create the largest impact.

## Benefits of Membership

- Become more proficient at fulfilling the philanthropic needs of your clients
- Network with like-minded colleagues
- Promote philanthropic giving
- Educate professionals on the work of the Jewish Federation, both local and international, and its partner agencies

## API serves as a Foundation outreach arm to professional communities with three distinct purposes.

- API **creates** partnerships within the professional community that can motivate potential donors.
- API **educates** professionals on the work of the Federation, locally and globally. The objective is to secure planned gifts for the Jewish Federation of Broward County.
- API **provides** its members with opportunities to connect with their colleagues, fulfill their continuing education requirements through seminars, and participate in social gatherings throughout the year.

Advisors who secure planned gifts for the Jewish Federation of Broward County will become members of API's Mitzvah Society. Mitzvah Society members are honored at our Cocktail & Awards Reception.



# ADVISORS PHILANTHROPY INITIATIVE (API) MEMBERSHIP APPLICATION

## Membership Qualifications of Application:

- Member should be a professional advisor in the Tax, Estate Planning and Financial Planning disciplines who is in good standing.
- Member should be committed to the promotion and development of awareness of the causes and agencies that the Jewish Federation of Broward County supports.

## Membership Responsibilities:

- Educate, encourage, and solicit clients/potential donors to commit financial resources to the Jewish Federation of Broward County.
- Attend at least two API-sponsored events during the year.
- Upon request, assist Jewish Federation professionals and other members of the Advisors Philanthropy Initiative with professional expertise through research, advice, and consultation.
- Assist in contacting other professionals to inform them of the Jewish Federation's programs and activities.
- Help recruit new members.

## Membership Requirements:

- API members will refrain from using committee membership in public advertising.
- API members will refrain from soliciting your professional services to donors who have been referred to you for consultation.
- API members shall conduct themselves in a professional, ethical, and honest manner at all times.
- API members are expected to maintain a high standard of confidentiality.

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

(Please include credentials, license, or title)

Profession:  Insurance  Banker  Accountant

Stock Broker  Wealth Management  Trust Officer/Banker

Attorney: Type of Attorney \_\_\_\_\_

Other: \_\_\_\_\_

Business Name and Address:

\_\_\_\_\_  
\_\_\_\_\_

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

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

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

E-mail: \_\_\_\_\_

Website: \_\_\_\_\_

Birthday: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ mm/dd/yyyy

Referred by: \_\_\_\_\_

Thank you for your interest in joining the Advisors Philanthropy Initiative (API) of the Jewish Community Foundation of the Jewish Federation of Broward County.

Upon acceptance of these terms, please sign below on this form and return it to Judy Levenson at [jlevenson@jewishbroward.org](mailto:jlevenson@jewishbroward.org). Your application will be reviewed in a timely manner, and upon acceptance, your membership will be confirmed.

I certify that I accept the requirements to be considered for membership of the Advisors Philanthropy Initiative and will adhere to the qualifications and responsibilities as a member.

I agree to support the Jewish Federation of Broward County with an annual campaign gift of

\$1,000  \$750  \$500  Other: \$ \_\_\_\_\_

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Signature