



# The Catholic Foundation of Central Florida

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## PLANNED GIVING ADVISORY COUNCIL

### **Planned Giving Advisory Council**

This Council comprises a group of active and talented charitable gift, estate and financial planning professionals dedicated to the mission and vision of The Catholic Foundation of Central Florida (CFOCF). The goal is to support our community in realizing their philanthropic impact through a network of estate and financial planning professionals. The CFOCF and the Advisory Council Members will provide educational and networking opportunities to support Central Florida professionals with incorporating distinct services that will help their clients realize the philanthropic impact they have already accomplished through their giving and connect them to resources to further their philanthropic journey.

### **Planned Giving Advisory Council Members:**

Serve as ambassadors in the Central Florida community.

Promote charitable and planned giving opportunities providing their clients not only tax benefits but also resources to help them realize their philanthropic goals.

Connect clients to philanthropic resources as appropriate including CFOCF which offers charitable giving tools compliant with Catholic/Christian social teaching and supports the financial future and growth of parishes, schools, and/or agencies, diocesan Catholic community, and the Catholic faith for future generations as well as our Central Florida community and local charities.

Assist as resources to CFOCF's gift planning staff, and liaisons to engage existing and new charitable gift planning professionals with CFOCF's and Council's network.

Serve as resources when available for CFOCF educational presentations at Legacy Planning Seminars.

Members of the Council shall be chosen from the following groups, taking into consideration the geographic make-up of the committee to include Orange, Seminole, Osceola, Lake, Polk, Marion, Sumter, Volusia, and Brevard Counties:

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

## Members should be willing to meet the following criteria:

- ❖ Meet several times a year for one hour. Planned Giving Advisory Council meetings will include mission related topics, information about the Council, and professional development. Meetings will take place either virtually or throughout the Diocese of Orlando at convenient parishes. Most meetings will be breakfast meetings, with occasional lunch meeting or evening social.
- ❖ Submit a background check/fingerprinting from an approved vendor. (There will be no additional fee.)
- ❖ Be a well-respected member of their profession and their parish.
- ❖ Give personal philanthropic support to The Catholic Foundation of Central Florida and to Our Catholic Appeal and be active in your parish.

## Responsibilities:

- ❖ Understand Catholic Foundation of Central Florida's case of support for planned gifts.
- ❖ Assist in education of pastors, parish staff, and parishioners in Planned Giving.
- ❖ Understand and practice planned giving ethics.
- ❖ Develop broader knowledge about planned giving vehicles.
- ❖ Promote charitable gift planning and Diocesan entities along with organizations that align with Catholic social teaching to their clients including socially screened endowments.
- ❖ Assist in bringing other professional advisors closer to The Catholic Foundation of Central Florida.
- ❖ Are encouraged to lead by example with their own planned gift to their parish, their parish school, or to another Catholic entity.

The Planned Giving Advisory Council membership is by invitation only and approved by the CFOCF Board of Directors Development Committee. Members of the CFOCF Board of Directors or Planned Giving Advisory Council may nominate a professional for membership.

Each member of The Catholic Foundation PGAC will be required to be an active member of their parish, make an annual gift to Our Catholic Appeal, and make an unrestricted gift to The Catholic Foundation of Central Florida Annual Appeal. The donation to CFOCF will be used to offset the costs of the PGAC.

All members of the PGAC are required to complete a background check and fingerprinting through the Diocese. We will verify and confirm that certifications are up to date through <https://brokercheck.finra.org>

## Benefits:

- Expand and nurture your professional network with individuals who share your faith.
- Hear from local and national speakers on topics related to planned giving.
- Build your professional toolkit to enhance the service you can provide clients to help them achieve their philanthropic aspirations.

View a list of current members at [www.cfocf.org/advisorycouncil](http://www.cfocf.org/advisorycouncil). To find out more about the council contact Madelyn Weed, CFRE, CAP, Vice President of Donor Services, at [mweed@cfocf.org](mailto:mweed@cfocf.org) or (407) 246-7188.





**The Catholic Foundation**  
of Central Florida

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## Membership Application

NAME: \_\_\_\_\_ PARISH: \_\_\_\_\_

BUSINESS/EMPLOYER: \_\_\_\_\_ TITLE: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_ CITY/ST/ZIP: \_\_\_\_\_

PRIMARY PHONE #: \_\_\_\_\_ PRIMARY EMAIL: \_\_\_\_\_

COUNTY OF BUSINESS: \_\_\_\_\_ COUNTY OF RESIDENCE: \_\_\_\_\_

NOMINATED BY: \_\_\_\_\_

Professional designations and certifications. Include your Professional ID number if applicable:

JD \_\_\_\_\_ CFP \_\_\_\_\_ CFA \_\_\_\_\_ CPA \_\_\_\_\_ CAP \_\_\_\_\_ Insurance \_\_\_\_\_

FINRA # \_\_\_\_\_

Other (list) \_\_\_\_\_

Do you help clients with planned gifts or beneficiary designations? \_\_\_\_\_

Have you ever contacted The Catholic Foundation of Central Florida or the Diocese of Orlando about a planned gift for you or a client? \_\_\_\_\_

Have you had a background check by the Diocese of Orlando (or related parish or parish school) within the last 5 years? NO \_\_\_ YES, with the following parish, school, ministry \_\_\_\_\_

*If you have any questions, please contact Madelyn Weed, CFRE, CAP, Vice President of Donor Services  
at (407) 246-7188 or mweed@cfocf.org.*