

# Professional Advisor Leadership Council

Affiliated with Worthy Circles



FOUNDATION FOR METROWEST

## What:

Professional advisors play a critical role in the future of philanthropy in our region. Our Professional Advisor Leadership Council (PALC) works closely with the Foundation for MetroWest to gain a greater understanding of the needs of the MetroWest community, so they can better address their clients' philanthropic goals. Council members include leading professionals from a variety of disciplines; estate attorneys, accountants, financial planners, wealth advisors, and insurance professionals.

Many members of our professional community see the promotion of philanthropy as one of the more meaningful aspects of their practice. Therefore, throughout the year, the Foundation for MetroWest works with PALC members to promote and encourage philanthropic conversations between advisors and their clients, and to bring awareness to the benefits of making tax advantageous gifts.

**We believe it is critical to stay closely connected to our professional advisor partners. Their clients are our donors, and we share the responsibility for providing them with exceptional service and informed guidance.**

The PALC meets monthly for one hour, two of those meetings being the Foundation's annual Spring Inspiration Breakfast in May and the Community Leadership Reception in September.

## Benefits:

- Listing on the Foundation's website and in the Foundation's annual report as a PALC Member
- Access to ten (10) PALC networking events and philanthropy seminars per year
- Recognition when attending Foundation for MetroWest events throughout the year
- Opportunity to be recognized among your peers for philanthropic contributions in the region
- Monthly resource email which includes charitable giving ideas and trends in philanthropy, as well as specific charitable information pertaining to this region.
- Opportunity to present content to the Foundation for MetroWest's donors through the blog series, webinars, social media or other channels

## Join:

To join the Foundation's PALC you must be a professional advisor who lives or works in MetroWest or has a client base with MetroWest representation. Members are also encouraged to attend at least 75% of the meetings and make an annual contribution to the Foundation for MetroWest through the ONEmetrowest Fund (average gift size ranges from \$500 - \$1,000), sponsor one of our events (average sponsorship size is \$2,500) or support one of our many other initiatives or projects that are meaningful to you.

Annual memberships begin in January of each calendar year. **For questions regarding the PALC, please contact Renee Quinn, Director of Development, [rquinn@foundationformetrowest.org](mailto:rquinn@foundationformetrowest.org).**

## Schedule:

<b>Tuesday, February 15</b>	Looking Into 2022	<b>Thursday, August 18</b>	Networking Reception
<b>Thursday March 17</b>	Arts & Culture Partnerships	<b>Thursday, September 15</b>	Legislative Update Impacting Philanthropy
<b>Tuesday, April 26</b>	A Conversation on Planned Giving	<b>September (Date TBA)</b>	Community Leadership Reception*
<b>Thursday, May 5</b>	Spring Inspiration Breakfast*	<b>Tuesday, November 15</b>	Youth & Family Support Partnerships
<b>Thursday, May 19</b>	Hunger Relief Efforts in MetroWest	<b>Thursday, December 15</b>	Foundation Year in Review
<b>Tuesday, June 14</b>	Networking Reception		

\*Ticket or sponsorship required to attend this event