



# Philanthropy is Good Business.

Advisors Philanthropic Initiative (API) is a networking division of the Jewish Federation of Broward County where professionals come together to connect, learn, and help promote philanthropic discussions.

API creates partnerships within the professional community that have the ability to motivate potential donors. Our job is to educate our professionals on the work of the Federation, locally and globally.

## 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

## WE NEED YOUR HELP TO DO THIS IMPORTANT WORK

Thank you to the following advisors who referred their clients to us and helped grow our foundation to the **\$200+ million** that it is today.

Lori Adelson  
David Appel  
Jeffrey A. Baskies  
Howard N. Bienenfeld  
William Blade  
Marvin T. Bornstein  
Herbert Jay Cohen  
Alan B. Cohn  
Sam Eppy  
Libo Fineberg  
Adrienne Frank

Randy S. Friedlander  
Jill Ginsberg  
Gene K. Glasser  
Adam Goldberg  
Thomas O. Katz  
Corinne R. Korn  
Les S. Kushner  
Christy Lambertus  
Carol Lasek  
Denise A. Lettau  
Jack R. Loving

Ross Manella  
Bonnie S. Miller  
Richard B. Sabra  
Jeff Sandler  
Myron Sandler  
Jeffrey Saster  
David B. Schulman  
Shawn Snyder  
Sheri F. Schultz  
Joseph L. Schwartz  
David M. Scully

Barbara A. Shore  
David A. Shulman  
Mitch Starr  
Eric W. Sulzberger  
Leonard Suskind  
Donald R. Tescher  
Benjamin A. Tobias  
Denise Walker  
Ricky J. Weiss  
Barry Alan Wilen  
Kelly Williams

For more information or to be added to the list above, please contact [JLevenson@jewishbroward.org](mailto:JLevenson@jewishbroward.org)



**Jewish Federation**  
of Broward County  
Advisors Philanthropic Initiative

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# 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