

# Professional Advisor Leadership Council

*A Leadership Council of the Foundation for MetroWest*



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 advance its mission, while increasing awareness about the needs in the MetroWest community so advisors can better address their clients' philanthropic goals. Council members include leading professionals from a variety of professions; estate attorneys, accountants, financial planners, wealth advisors, and insurance professionals.

The members of the PALC see the promotion of philanthropy as one of the more meaningful aspects of their practice. Four times a year the PALC hosts educational and social events for the broader MetroWest professional advisor community. These events promote philanthropic conversations between advisors and clients, while building greater awareness of the Foundation's mission and philanthropic services.

**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.**

## Benefits:

- Listing on the Foundation's website and in the Foundation's annual report as a PALC Member
- Access to four council meetings and four networking events 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 membership begins 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:

### **Schedule of Council Meetings (Working Meetings)**

Thursday, February 9 @ 8:30 AM  
Thursday, May 4 @ 8:30 AM  
Thursday, July 13 @ 8:30 AM  
Thursday, October 19 @ 8:30 AM

### **Professional Advisor Events (Educational and Social Events)**

Thursday, March 30 @ 4:30 PM  
Thursday, April 27: Spring Inspiration Breakfast\*  
Thursday, June 22 @ 8:30 AM  
Thursday, August 24 @ 4:30 PM  
Thursday, September 27: Community Leadership Reception\*  
Friday, October 27: ONEmetrowest Day  
Thursday, November 30 @ 8:30 AM

\*Ticket or sponsorship required