Become a Member of the
Community Foundation for the Alleghenies'

PLAN Philanthropic Leaders Advisory Network

The goal of the PLAN is to partner with professional advisors dedicated to carrying out their clients' charitable goals while helping to build assets in their communities.

Pre-requisites:

- Meet individually with CFA to discuss PLAN
- Review and sign off on CFA PLAN handbook
- Attend at least 1 of 3 CFA sponsored CE seminars annually. CLE, CFP and CTFA credit are available and the cost is only $10 per seminar

Benefits:

- Your name listed on our website's PLAN page with a link to your website
- Your name listed in our e-newsletter with a link to your website
- Invitations to participate in educational trainings and other events for professional advisors
- Meet like-minded professionals to exchange ideas and information
- Develop a deeper understanding of the CFA and the role it can play in your practice or firm
- The CFA staff is available to discuss specific charitable giving scenarios, provide materials or gift illustrations, and attend joint meetings with your clients, if appropriate.

COMMUNITY FOUNDATION FOR THE ALLEGHENIES

SERVING BEDFORD, CAMBRIA, SOMERSET, AND INDIANA COUNTIES