

Planned Giving Advisory Council

About the PGAC

Who We Are:

The Planned Giving Advisory Council (PGAC) brings together estate and financial planning professionals: attorneys, CPAs, financial planners, insurance professionals - in service to their clients and the Catholic community across Central Florida.

Our Mission:

- Offer educational events and peer networking
- Serve as ambassadors to promote charitable and planned giving
- Support parishes, schools, Catholic ministries, and the broader community through philanthropic tools



PGAC Services & Roles

What You'll Do:

- Attend 3–4 virtual/in-person meetings per year (1 hr, breakfast and networking for those attending in person)
- Provide guidance to pastors, parish staff, parishioners on charitable strategies
- Serve as a resource at legacy planning events and educational forums
- Share opportunities to support ministries in the Diocese of Orlando with your clients, as appropriate
- Connect CFOCF's gift planning team to your professional network

Member Expectations:

- Be an active Catholic and respected parishioner
- Professionally credentialed and ethically committed
- Complete a background check and fingerprinting via Diocese (fees covered)
- Support the work of The Catholic Foundation

How to Join

- **Next Steps:** Submit the short application form. All members are reviewed and approved by The Catholic Foundation's Board of Directors.
- **Join Us:** Be part of a trusted network offering real solutions for clients' charitable and estate planning goals faithfully and professionally.

Your Benefits

- **Grow Your Network:** Connect with fellow faith-driven professionals serving nine counties across Central Florida.
- **Professional Growth:** Engage in ongoing education, sharpen your gift planning expertise, and stay current on charitable tools aligned with Catholic values.
- **Recognition & Gratitude:** Attend special events alongside diocesan and other mission-aligned leaders.
- **Meaningful Contribution:** As a PGAC member, you help clients achieve their charitable goals while making a lasting difference for Catholic parishes, schools, and ministries. Your guidance results in life-changing gifts that strengthen ministries and uplift communities throughout the Diocese.
- **Trusted Impact:** Whether advising on donor advised funds, bequests, or complex gifts, your expertise helps families make faith-filled decisions while securing vital support for the Church's mission.

Visit cfocf.org/advisorycouncil or Contact
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