



## Professional Advisor Council Charter

### 1.0 STRUCTURE

- 1.1. The Professional Advisor Council (PAC) will be a sub-committee of the Executive Committee. Parasol Tahoe Community Foundation (Parasol) board members (Board) are represented on the committee and one individual will be invited to report at quarterly Board meetings.

### 2.0 PURPOSE

- 2.1. The PAC is a group of expert Tahoe/Reno professional advisors working together with Parasol to improve philanthropic knowledge and networking. This strategy will help Parasol build relationships with advisors to initiate conversations about charitable giving.

### 3.0 ROLL OF COUNCIL MEMBERS

- 3.1. The group will be a resource for presenting topics that are relevant to their respective industries, planned giving initiatives and new developments at Parasol. Their input will be requested for all marketing materials geared to them and their clients.
- 3.2. Create and lead one to two panel discussions on charitable or planned giving annually.
- 3.3. Attend bi-annual meetings of the PAC and foundation events.
- 3.4. Introduce Parasol to appropriate clients, the community and other professional advisors.
- 3.5. Cultivate Professional Advisors Network (PAN) to increase exposure and fill PAC openings.
- 3.6. Members will be recognized on Parasol's website, receive referrals and have access to Gift Law resources.

### 4.0 ANNUAL EVENTS

- 4.1. The PAC will meet 3-4 times per year, the PAN will meet 1-2 times per year.

### 5.0 COMPOSITION AND APPOINTMENT

- 5.1. The PAC will bring together around 15 expert advisors in fields including accounting, estate planning and wealth management. PAC membership will be by Board invitation. PAC members shall be appointed for a two year term.

### 6.0 STAFF SUPPORT

- 6.1. The PAC and PAN will be a primary responsibility of the CFO.