



THE CATHOLIC
FOUNDATION

PROFESSIONAL ADVISORS GROUP

A Network Of Professionals

The Catholic Foundation's Professional Advisors Group (PAG) is comprised of trusted professionals including estate planning lawyers, financial planners, insurance professionals, accountants, funeral directors, and trust officers. There are two levels of PAG membership: Regular (non-dues paying) and Sustaining (\$100 annual dues).



PAG benefits

- Quarterly education series
- Receive a subscription to a weekly GiftLaw e-newsletter
- Receive the quarterly Blessings newsletter
- Participate in social events and mixers with other trusted professionals
- Recognition as a Sustaining member in The Catholic Foundation's Annual Report
- Promotion of name, picture, and contact information on The Catholic Foundation's website
- Free admission to the annual John L. Sauter Estate Planning Seminar, which includes 3 CEUs (a \$50 value)
- Opportunity to work with the Foundation's donors
- Represent your parish in your professional network



THE CATHOLIC FOUNDATION'S
Professional Advisors Group



To Sign Up, visit - www.catholic-foundation.org/pag



THE CATHOLIC FOUNDATION

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As each has received a gift, use it to serve one another, as good stewards of God's varied grace.

- 1 Peter 4:10

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Objectives of PAG

- To provide members with a greater understanding of the impact by The Catholic Foundation
- Opportunities to learn pertinent educational topics and networking opportunities
- To offer professional expertise to individuals who are considering a charitable gift
- To support educational efforts regarding estate and gift planning throughout the Diocese of Columbus
- Growth in faith stewardship



My role as a member

- To serve as a resource to donors, parishes, constituent organizations and Foundation staff
- To participate in quarterly educational series and quarterly networking events
- To participate in the Annual John L. Sauter Estate Planning Seminar



Let's talk

About Us

The Catholic Foundation's mission is to inspire giving and assist donors to provide for the long-term needs of the 23-county Diocese of Columbus. The Catholic Foundation is one of the oldest and largest Catholic foundations in the country, distributing nearly \$150 million throughout the diocese since 1985.

Why Us

The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.

