

Create a Jewish Legacy
Professional Advisor Annual Awards
Award Criteria



Create a Jewish Legacy presents the following awards to recognize the important partnership between professional advisors, clients, and Jewish organizations.

Firm Award (qty: 1)

Honors a group of professional advisors who have significantly helped to steward planned legacy gifts for the Jewish community in the past year.

Firm nominees exemplify the following award criteria:

- 2 or more firm professionals attended a Create a Jewish Legacy training in the past year;
- Assisted clients in creating a Jewish Legacy for a CJL organization;
- Stewarded the most planned gifts for the Jewish community through Create a Jewish Legacy from 2011-2012.

Individual Awards (qty: 3)

Honors a professional advisor who has gone above and beyond to encourage clients and members of the community to create a Jewish Legacy.

Accountant, Attorney, and Financial Advisor

Nominees exemplify the following award criteria:

- Attended a Create a Jewish Legacy training in the past year;
- Personally created a Jewish Legacy for either the Jewish Federation of Greater Atlanta or for one or more CJL partner organizations;
- Assisted clients in creating a Jewish Legacy for a CJL organization;
- Stewarded the most planned gifts for the Jewish community through Create a Jewish Legacy from 2011-2012.

Rising Star Award (qty: 1)

Honors a professional advisor under the age of 40 who has finalized the most legacy gifts for the Jewish community in the past year.

Nominees exemplify the following award criteria:

- Attended a Create a Jewish Legacy training in the past year;
- Personally created a Jewish Legacy for either the Jewish Federation of Greater Atlanta or for one or more CJL partner organizations;
- Assisted clients in creating a Jewish Legacy for a CJL organization;
- Stewarded the most planned gifts for the Jewish community through Create a Jewish Legacy from 2011-2012.

To speak confidentially to a Federation professional regarding your client's plans, contact Phyllis Silverstein, VP of Planned Giving & Endowment, at psilverstein@ifga.org or 404.870.1616.