

VIEW

One of the most attractive ways for younger people to become involved is through the creation of a philanthropic fund, also known as a donor-advised fund.

Once a philanthropic fund is created, the donor has the right to make recommendations for the

Philanthropic funds are financially attractive to people of all ages. While the minimum guideline for establishing a philanthropic fund through the Foundation is \$5,000, that number drops to \$3,600 for people under age 45. Philanthropic funds can help

better off we will all be in the long run.

For more information on philanthropic funds or other ways your younger clients can become involved, please contact Herb Eisenberg at the Foundation, 305-576-4000, ext. 629.



Members in Motion

Former PAC Chair **Donna R. Blaustein** was recently appointed chair of the board of the Miami Lighthouse for the Blind and Visually Impaired, which provides much-needed training and counseling to visually impaired individuals in Miami-Dade County.

PAC Chair **Steven D. Brooks** and wife, Lainey, became proud grandparents for the first time when daughter, Lisa, and son-in-law, Warren, welcomed Lindsey Brooke Levitan into the world on April 7. Lindsey weighed in at 8 lbs., 6 oz.

David L. Burg, CFP, CLU, ChFC is Vice President Investments at Smith Barney, 220 Alhambra Circle, 10th floor, Coral Gables, FL 33134. Phone: 305-460-7816.

PAC Immediate Past Chair **Michael A. Dribin** has been named a managing partner at the law firm of Broad and Cassel. A board-certified wills, trusts and estates lawyer, Mike has been with the firm for 17 years.

Sheila Duffy-Lehrman was profiled in the Spring, 2004 issue of *Lifestyles Magazine*. The article touched on her efforts on behalf of the National Council of Jewish Women and Jewish day school education.

Sheri Lessne Farbish, Esq. has joined the law firm of Cohen, Chase, Hoffman & Schimmel, P.A., in Miami, practicing in the area of estate planning.

Ginzoscloset.com, owned and operated by **Jill R. Ginsberg**, has been awarded Power Seller status by ebay.com. The award is based on feedback and sales on ebay. Ginzoscloset.com is an online retail store selling new and used women's clothing, shoes, handbags and accessories. Portions of all proceeds go to various Miami charities, including the Greater Miami Jewish Federation.

Barry Givner has been promoted to senior vice president and fiduciary services manager for SunTrust Bank's South Area, which covers the Brickell, Coral Gables, Bal Harbour and Hollywood Private Client Services Offices. As fiduciary services manager, Barry is responsible for the day to day oversight of trust administration.

Deena Katz and **Harold Evensky** have been named to *Investment Advisors* magazine top 25 most influential people in the financial planning business.

Beth Moskowitz Lazar and husband Scott became proud parents on Nov. 7, welcoming Jordyn Ellie Lazar. Jordyn weighed in at 8 lbs. 14 oz. and both she and her parents are doing very well.

Linda S. Lubitz, CFP, has published her first book *Creating An Investment Policy Statement: Guidelines and Templates*, which sold out in its first month of publication. She was also profiled in *Solutions Magazine* in their Practice Profile Snapshot and spoke at the National Conference for the Financial Planning Association.

Howard Lucas has been appointed to the board of the National Kidney Foundation of Florida. Howard is a past president of the Kidney Foundation of South Florida.

Penny Marlin has been elected president of the Miami-Dade Chapter of the Financial Planning Association, a 170-member organization of financial service professionals.

Iris J. Roth has been designated as a registered financial gerontologist, specializing in financial issues of elderly individuals.

Elizabeth Schwartz recently spoke at the "Valuing Our Families" conference in Ft. Lauderdale about legal concerns for gay and lesbian couples considering parenthood. She has also been selected for the third class of the Miami Fellows Initiative, a leadership training project of the Dade Community Foundation. Through the initiative, 18 emerging leaders from across Miami-Dade County will participate in experiential learning, mentoring and skill building in order to more effectively impact their communities and be agents of social change.

Tamra Sheffman recently accepted a Diamond Palm Award for Excellence on behalf of her company, Fortune International Realty. The honor is presented by the Miami Beach Chamber of Commerce to innovative Miami Beach companies that have a history of marked growth and earning potential and demonstrate strong community involvement.

Gary P. Simon has been elected president of Temple Judea in Coral Gables.

Paul M. Stokes has moved his law office. The new address of Stokes McMillan and Maracini is: One SE Third Ave., Suite 1750, Miami. Phone: 305-379-4008, ext. 225. Fax: 305-379-4848.

Gerald Teitelbaum, CPA, has been appointed a trustee of the City of Miami Firefighters' and Police Officers' Retirement Trust.

Marsha C. Witt is now the managing director of Asset Management Advisors (AMA) in Miami. She will be responsible for client service and the delivery of AMA's wealth management model.

Darin I. Zenov was just reappointed chair of the Fiduciary Income Tax Committee of the Tax Section of the Florida Bar. Also, his impressive collection of masks was the subject of a recent article in *Quorum Magazine*.

Announcing the 2004-2005 PAC Steering Committee

- CHAIR
Steven D. Brooks
- PAC DIRECTORY
- Andrea Darlow** **Sheri L. Farbish**
- UPTOWN DOWNTOWN
- Jill R. Ginsberg** **Jeffrey A. Kern**
- 2005 TAX SEMINAR
- Edward F. Harris** **Bernard Dane Stein**
- LEGAL
- Joseph Barry Schimmel**
- INSURANCE NEWSLETTER
- Robert J. Singer** **Sydney S. Traum**
- PROGRAMS
- Marsha C. Witt**
- RECOGNITION & DEVELOPMENT
- Darin I. Zenov**

Mazel tov to all of these great leaders. Their efforts and talents will help us to have an outstanding year.