

DONOR ADVISED FUND

GIVE

EASY, FLEXIBLE & EFFECTIVE

FUND THE CAUSES YOU CARE ABOUT
FROM ONE CONVENIENT ACCOUNT.

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION
LOS ANGELES



“The Foundation has helped our family expand its philanthropic scope and is bringing a new level of professionalism to our charitable giving process.”

– Mindy & Gene Stein,
Foundation Donors

“Thankfully, our charitable giving is easy to manage through The Foundation. We can add to our fund when it makes sense for us to do so, and we can allocate grants whenever we want. It’s rewarding and satisfying to be a part of The Foundation.”

– Judith & Bernard Briskin,
Foundation Donors



DONOR ADVISED FUNDS

A Donor Advised Fund is like a charitable checking account that you can use to recommend grants to the charities you select, Jewish or otherwise. It’s affordable, user-friendly, and maximizes your philanthropic impact.

- Start with \$5,000 or more
- Centralize charitable dollars in one convenient account
- Minimize capital gains taxes when gifting appreciated assets such as stock
- Recommend grants of \$100 or more anytime locally, nationally, or in Israel
- Create a legacy for your family without the burdens and expense of a private foundation
- Maintain total privacy versus a private foundation
- Enjoy online access to your fund 24/7
- Tax receipts for online donations are available immediately via email and PDF

TAX ADVANTAGES

All contributions qualify for an immediate fair market value tax deduction. When you transfer securities, real estate, or business interests to your fund, you can also minimize capital gains taxes. Your Donor Advised Fund grows tax-free, and unlike a private foundation, there’s no minimum annual distribution requirement.

INVESTMENT OPTIONS

Your Donor Advised Fund’s assets are invested in a pooled portfolio that is professionally managed by The Foundation’s Investment Committee. Strategy is geared toward safeguarding your funds while providing liquidity for your grantmaking.

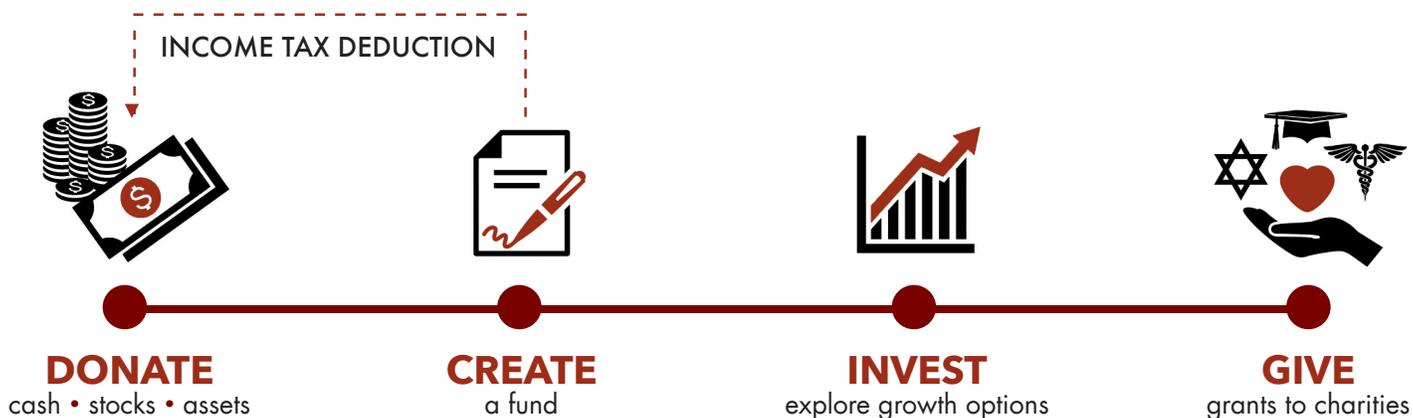
– With a minimum balance of \$50,000, you may invest in several mutual fund options, select Israel Bonds, and The Foundation’s Strategic Return Fund, which consists of a diversified pool of mutual funds and exchange-traded funds.

– For \$500,000 or more, you may contact us about other options involving your own investment advisor approved by The Foundation.

The Foundation’s annual fee is 1.5% of the Donor Advised Fund’s assets, a portion of which funds The Foundation’s grants programs.

CUSTOMIZED SERVICE & PROFESSIONAL EXPERTISE

Through the complimentary consulting services of our Center for Designed Philanthropy, we can help you shape meaningful, personalized philanthropic strategies, build consensus among family members, and develop creative solutions to magnify the impact of your giving.



ENGAGE YOUR NEXT GENERATION IN PHILANTHROPY

BUILD A PERMANENT FAMILY LEGACY

Ensure next generation participation by creating Donor Advised Funds for your children and grandchildren or by designating your children to recommend grants as successors to your Donor Advised Fund. You and your family can enjoy grantmaking while we handle all the administrative details.

“When we surprised our grandchildren with their own Donor Advised Funds, they asked good questions about charitable giving and have been excited to carry on what has been important to us in our lives. We hope our grandchildren will use this valuable tool to find meaningful involvement with many causes as well as friendships throughout their lives.”

-Peggy and Ed Robin, Foundation Donors

“Our family’s Donor Advised Fund encourages us to spend time working together. We are so lucky to be able to honor causes that our parents were passionate about and give to charities that are meaningful to us and our own children.”

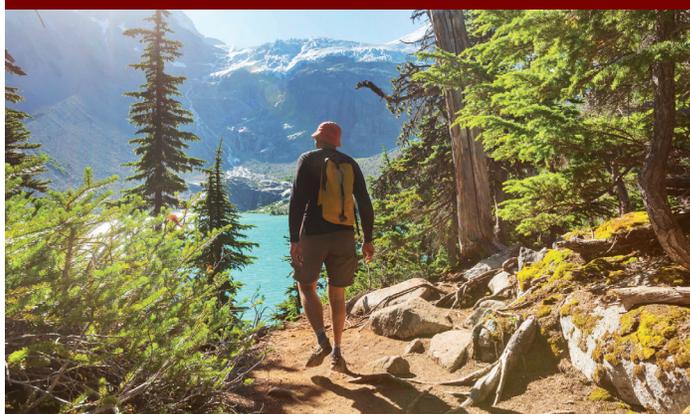
-Davia Rivka, one of four Berlfein sisters whose parents, of blessed memory, opened a Donor Advised Fund in 1980. Each sister subsequently opened their own fund.



Peggy and Ed Robin use their Donor Advised Fund to make donations to numerous Jewish, Israeli, and educational charities among others.



Davia Rivka uses her Donor Advised Fund to support environmental causes such as Citizens Climate Lobby and Rails to Trails among others.



CREATE A TRIBUTE FUND TO HONOR OTHERS

You can also establish a Donor Advised Fund as a Tribute Fund so friends and family members can make tax-deductible online contributions to your fund at any time, in any amount, to honor milestones (birthdays, weddings, anniversaries, and bar or bat mitzvahs) or to remember loved ones. A Tribute Fund includes a webpage personalized with your fund’s purpose, a photo of your honoree, and your own web address to share with friends and family.



DO A WORLD OF GOOD
WITH YOUR DONOR ADVISED FUND.

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION
LOS ANGELES

Since 1954 • Over \$1 billion of assets • Over \$1 billion in grants in past 25 years

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