

DONOR ADVISED FUND

Organize your charitable giving in a single account.



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A Donor Advised Fund is a simple, convenient and tax-effective way to organize your charitable giving.

How does it work?

- ▶ Establish a fund with Jewish Federation of Northern New Jersey by completing a simple contract.
- ▶ Contribute cash and/or securities to your account any time.
- ▶ If you contribute appreciated assets, we sell the securities and, because we are a tax-exempt organization, no capital gains taxes are payable.
- ▶ Jewish Federation of Northern New Jersey invests your Donor Advised Fund assets. You may recommend an asset allocation amongst four portfolio options.
- ▶ Your account is credited with all income and investment returns, for tax-free growth.
- ▶ Although the fund legally is the property of Federation, you and/or anyone you designate may recommend “grant distributions” to qualified charities from your fund at any time. Grants are paid twice each month.
- ▶ View your account balance and activity, research charities, and request grants online, through our secure donor portal. You can opt for email confirmations and statements as well.
- ▶ Receive quarterly statements.

Jewish Federation endowment staff are available to work with you and your financial and legal advisors to help you realize your philanthropic goals.

What are the benefits?

- **Tax Benefits.**
 - Receive income tax deductions for eligible contributions as allowed by law.
 - Avoid paying capital gains taxes when you contribute appreciated assets.
- **Flexibility.** Contribute to and request distributions from your Fund on your own schedule, even in different years.
- **Convenience.** Our online donor portal makes it easy for you to review your account activity and request grants at your convenience.
- **Organization.**
 - Manage your charitable giving in a single account.
 - Collect fewer tax receipts for tax reporting purposes.
 - Easily track your charitable giving history.
- **Planning.** Because you can contribute one year and distribute in subsequent years, you can use your Fund to create a long-term philanthropic plan, including repeat or legacy gifts.
- **Accessibility and Simplicity.** A DAF provides many of the advantages of a Private Foundation, but is much simpler to establish and maintain. You can open a Donor Advised Fund with Jewish Federation with as little as \$5,000.
- **Anonymity.** You can make anonymous charitable gifts from a Donor Advised Fund.
- **Impact.** Establishing your fund with Federation helps promote Jewish Federation as a philanthropic force in the broader community.
- **Values.** You can name your children as successor grant recommenders to encourage their charitable giving.

This material is presented for informational purposes only and should not be construed as legal, tax or financial advice. When considering gift planning strategies, you should always consult with your own legal and tax advisors.

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