

JEWISH COMMUNITY FEDERATION AND ENDOWMENT FUND



# DONOR ADVISED FUNDS

ALIGN YOUR CHARITABLE GOALS WITH YOUR VALUES

[JEWISHFED.ORG](http://JEWISHFED.ORG)



# VISION, MISSION AND VALUES

Guided by the timeless Jewish values of *kehilla* (community), *tzedakah* (giving with just intention), and *tikkun olam* (repairing the world), the Jewish Community Federation and Endowment Fund is a philanthropic catalyst, connecting people of all ages, backgrounds, and perspectives to the power we have as a Jewish community to improve the world. We partner with donors, organizations, and foundations to address the pressing issues facing our community, and develop innovative strategies that result in deep and lasting impact locally, in Israel, and globally.

Through the support of a deeply connected Jewish community, the Federation awards millions of dollars in direct grants each year, facilitates thousands more grants through philanthropic vehicles, and develops programs to meet Jewish communal needs. This critical work provides Jewish experiences and education to thousands of children, cares for our most vulnerable seniors and families, allows for exploration of innovative new ventures, bolsters pluralism and equality in Israel, and helps sustain Jews around the world.

## TRUSTED FOR MORE THAN 100 YEARS



### **1910-1930**

The Federation of Jewish Charities revolutionized charitable fundraising in San Francisco.



### **1930-1950**

Provided relief during the Great Depression and WWII, assisted refugees, and supported the birth of Israel.



### **1950-1970**

Combated anti-Semitism, performed first population study, and fundraised for community needs during periods of growth and demographic change.



### **1970-1990**

Supported the Soviet Jewry movement, the rise of immigration, and established the Endowment Fund.



### **1990-2010**

Focused on pluralism and democracy in Israel, rescuing Jews remaining in Ethiopia, and strategic changes to better serve our local community.



### **2010-Present**

Entering a new millennium reaffirmed our commitment to strengthening our Jewish community for future generations.

# MAXIMIZE YOUR CHARITABLE GIVING WITH A DONOR ADVISED FUND

A Donor Advised Fund (DAF) with the Federation is a low-cost philanthropic vehicle that allows you to set aside charitable dollars in a tax-efficient way for grantmaking now or in the future.

A DAF is more than just a flexible philanthropic tool. It's a way to obtain immediate and substantial tax benefits, support vital community programs, and make a meaningful impact on the world we live in today, and the world our children will inherit tomorrow.

We inaugurated our DAF program in 1976 with two funds. Today, the program has grown substantially – over 900 DAFs with a combined value of \$500 million. Since the program's inception, donors have granted more than a billion dollars to over 7,000 local and global charities.

We simplify giving so that you can focus on your charitable passions – whether education, Jewish experiences, emergency relief in Israel, general support for the Jewish community, or otherwise. We can help you craft a strategy to make an impact on issues that matter most to you. Our knowledge, experience, and collaborative relationships help donors achieve their philanthropic goals, whatever their focus.

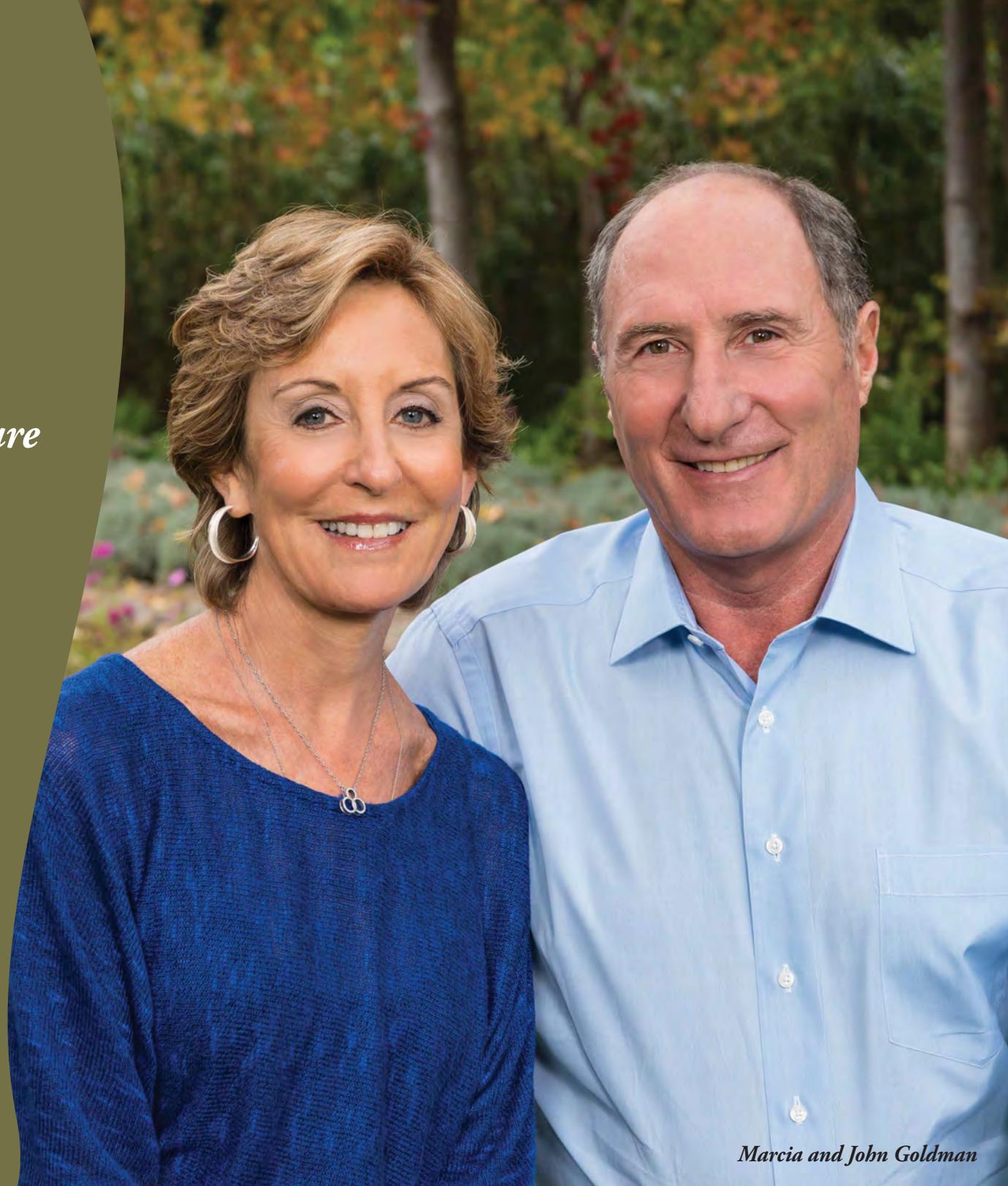
*“DAFs are the fastest growing charitable giving vehicle in the country.”*

*– The National Philanthropic Trust*

*“The passing of a legacy has been given meaning through our Donor Advised Fund.*

*There is no greater pleasure than to see our children living the same values through their own volunteerism and philanthropic commitment.”*

*- John Goldman*



*Marcia and John Goldman*

# BENEFITS OF A DAF INCLUDE:

## SIMPLE TO START AND MANAGE

- ▶ Opening a DAF is easy – no setup costs, only one form to sign, and a minimum contribution of \$5,000 (cash, stock, or other assets).
- ▶ All grantmaking and administrative tasks are managed by the Federation staff.

## TAX-EFFICIENT

- ▶ Tax benefits are received immediately upon making a contribution to your fund.
- ▶ No tax on earnings in the fund, and DAFs do not require tax return filing.
- ▶ Receive the maximum tax deduction for cash contributions to the fund and for gifts of qualified appreciated assets held more than one year.
- ▶ Naming the fund as the beneficiary of your will, trust, or retirement plan may result in substantial tax savings.
- ▶ For individuals facing large capital gains because of stock portfolios with highly appreciated equities, or due to a stock buy-out, contributing stocks to a DAF will avoid capital gains tax on the contributed stocks.

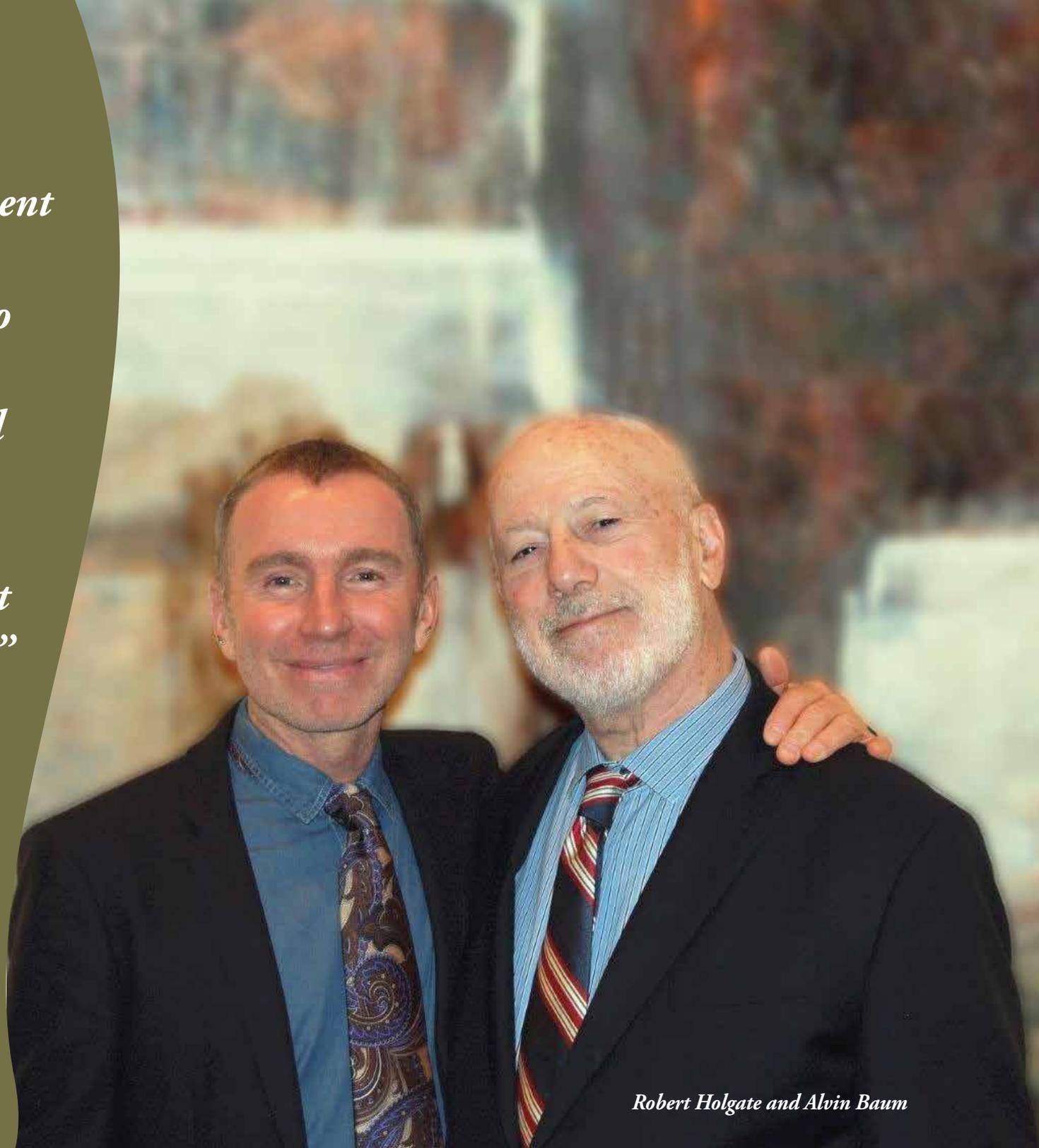


*“By giving appreciated stock directly to our DAF, it allowed us to grant almost 40% more!”*

*– Ben and Adean Golub*

*“I believe in commitment to the community. I have a responsibility to support the causes I care deeply about, and a DAF through the Federation is an enormously convenient way for me to do that.”*

*- Alvin Baum*



*Robert Holgate and Alvin Baum*

## FLEXIBLE

- ▶ No annual minimum distribution required; nor is there a requirement to make grants by year-end.
- ▶ Give a meaningful name to your fund, either in your own name, for a loved one, or a term of significance for you; you may also make grants anonymously upon request.

## ONLINE ACCESS

- ▶ Recommend grants at any time and review past grants.
- ▶ See a summary of contributions to your fund, cash available for grantmaking, and total fund balance.
- ▶ View quarterly statements and investment returns.
- ▶ Select from a pre-populated list of nonprofit grantees or recommend a grantee of your choosing.

VISIT [JEWISHFED.ORG](http://JEWISHFED.ORG) TO EXPLORE PHILANTHROPIC OPTIONS AND FIND OUT HOW TO:

- Partner with us for guidance on where your dollars can make the greatest impact
- Deepen your knowledge with tools and services to help you make informed choices
- Help you develop an individual or family philanthropy plan

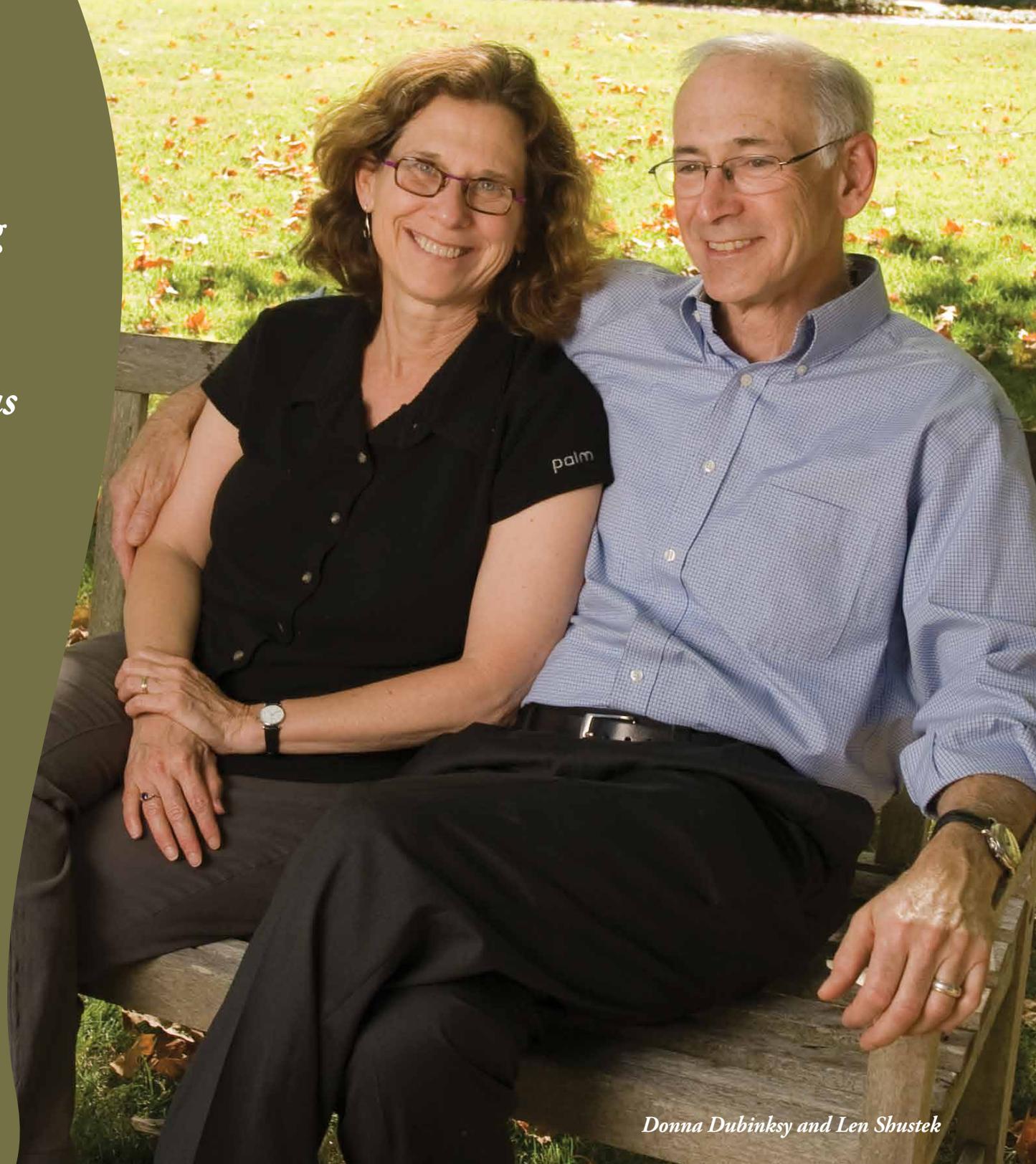


*“Having my DAF at the Federation allows me to have a simple, efficient giving vehicle, while giving with a Jewish lens.”*

*– Josh Becker*

*“I did a great deal of research before coming to the Federation. The flexibility of a Donor Advised Fund allows us to contribute at the most opportune time, and then make recommendations at our convenience.”*

*- Donna Dubinsky*



*Donna Dubinsky and Len Shustek*

## EXPERT STAFF

- ▶ The Federation's knowledgeable staff has a broad range of expertise available to fund holders, on topics including strategic grantmaking, Jewish community needs, and multi-generational family philanthropy.
- ▶ Exclusive access to ongoing philanthropic education featuring local and global thought-leaders through programs such as seminars, webinars, and events.
- ▶ Our staff brings a broad array of skills to our client work, including certifications in 21/64 training (generational awareness and technical tools working with next-generation funders and families) and the Wexner program (advanced Jewish learning and leadership development).

## INVESTMENT OPTIONS

- ▶ Choose the Federation Investment Pool that will best achieve your investment and grantmaking strategies.
- ▶ Investment gains accrued to your fund are non-taxable and allow you to increase your charitable impact.
- ▶ Your investment is managed by best-in-class experts – the same professionals who govern the Federation's Endowment Fund.



*“It’s like having  
a personal  
philanthropic  
bank account.”*

*– Dan Rubin*



*Dorothy and George, z"l Saxe Family*

*“My husband George and I established funds for each of our grandchildren when they were teenagers to instill them with a sense of community, responsibility, and philanthropy. I’m thrilled that their commitment to the Jewish community continues to strengthen with each passing year.”*

*- Dorothy Saxe*

## MAKE AN IMPACT THROUGH THE JEWISH COMMUNITY

- ▶ Whether your grantmaking supports Jewish or secular causes, all grants are made in the name of the Jewish community.

## ESTABLISH YOUR FAMILY LEGACY

- ▶ You have the option to pass the fund to future generations, making a gift that will endure the test of time.
- ▶ Become a Living Legacy Society member (donors who have included the Federation in their estate plan or established a permanent fund) by committing a legacy gift through your DAF.

## ADDITIONAL BENEFITS

- ▶ Meet with one of our philanthropic advisors to discuss your charitable goals. Annually review your giving history and evaluate whether you are reaching your philanthropic objectives.
- ▶ Stay informed about changing tax laws that impact your charitable giving.
- ▶ Federation advisors are available to identify areas of current need or new opportunities for funding in the community that are in alignment with your particular philanthropic interests.



*“A DAF is an excellent way to help protect the future of our community through the Federation. Ultimately, a fund offers each of us a way to make a gift to coming generations.”*

*– Peter Haas, z”l*



*“I live at the intersection of gender, sexual orientation and Judaism. Through my Fund I can be actively involved in the causes that mean the most to me. The Federation is a good place to develop strategic philanthropy.”*

*-Kathy Levinson*

# GET STARTED WITH THREE EASY STEPS

- ① Complete a Fund Agreement, which includes naming your fund.
- ② Submit your Agreement with a minimum \$5,000 contribution.
- ③ Begin recommending grants.



# MANAGING YOUR FUND ONLINE IS EASY WITH OUR SECURE PORTAL

NAVIGATION

- [Home](#)
- [Grant History](#)
- [Contribution History](#)
- [Groups Directory](#)
- [Sign Out](#)

YOUR FUNDS

JCF Demo DAF (Demo01)

Account Type: Donor Advised  
Total Fund Balance: \$1,000,000.00  
Cash Balance: \$500,000.00  
Grantable: \$500,000.00  
[View Statements](#)

[OPEN NEW ACCOUNT](#)

SEARCH FOR CHARITIES

[SEARCH](#)



**PLEASE NOTE: In order to ensure that we are able to get your grants paid out by the end of CY2016, please submit your recommendations no later than noon on Friday, December 23<sup>rd</sup>.**

### Manage your account:

Your dashboard displays all of your Donor Advised Fund account information relating to grants, contributions and statements, as well as information on current funding opportunities.

#### Grantmaking

-  [Recommend a Grant](#)  
Give to your favorite nonprofits or explore new ones.
-  [Grant History](#)  
See all of your previous grants to nonprofits.
-  [Documents & Forms](#)  
Information on policies, procedures, & guidelines.
-  [Planned Giving](#)  
Let your values guide your legacy.

#### Contributions

-  [Make a Contribution](#)  
See all the ways to add money to your Donor Advised Fund.
-  [Contribution History](#)  
View all gifts contributed to your Donor Advised Fund.
-  [Funding Opportunities](#)  
Support initiatives, partnerships, or community needs.
-  [Complimentary Philanthropic Advising](#)  
Let our staff help you strategize & engage your family.

STAFF CONTACTS

-  **Ruth Bender**  
Director, Donor Advised Funds  
415.512.6205  
Email: [Ruth](#)
-  **Helem Baskin**  
Fund Administrator  
415.512.6231  
Email: [Helem](#)
-  **DAF Team**  
Tel: 415.512.6225  
Fax: 415.495.6635  
[DAF@sfjcf.org](mailto:DAF@sfjcf.org)

PUBLICATIONS



Other Publications and Reports

- [User Orientation Guide](#)

RECENT GRANT ACTIVITY

- Pending Approval**  
No grants available
- In Process**  
No grants available
- Paid**  
No grants available
- Other**

# DONOR EDUCATION AND ENGAGEMENT OPPORTUNITIES

WE OFFER DONOR EDUCATION FOR INDIVIDUALS AND FAMILIES ON THE FOLLOWING TOPICS:

- ▶ Creating your mission statement.
- ▶ Establishing family giving practices.
- ▶ Understanding issues facing our community.
- ▶ Engaging multiple generations in philanthropy.
- ▶ Leaving a legacy of giving.

CAPITALIZE ON THE FEDERATION'S DONOR ADVISED FUND NETWORK OF MORE THAN 900 FUNDERS:

- ▶ Attend year-round Federation events and programs such as Day of Philanthropy, Business Leadership Council's speaker series, and Young Funders Network.
- ▶ Participate in exclusive DAF-holder gatherings and network with like-minded donors.
- ▶ Join us for our topic-driven events, seminars, and series.

To start the conversation, contact our DAF team at [DAF@sfjcf.org](mailto:DAF@sfjcf.org) or call 415.512.6225



Charity Navigator, America's largest independent evaluator of 501(c)(3) charities, has given the Federation its highest rating three years in a row, indicating that we execute our mission in a fiscally responsible way and outperform most other charities in America.



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