

FEDERATION PHILANTHROPY PARTNERS

# *Amplify Your Impact on the World.*



# With so many ways to give and so many organizations that need help, what's the best way to do good?

Giving thrives when it's driven by both the head and the heart. Federation Philanthropy Partners connects impact and meaning by helping you view the world through the lens of Jewish values:

**Taking Care of the Needy** (*Tzedakah*)

**Healing the World** (*Tikkun Olam*)

**Pursuing Justice** (*Tzedek*)

**Building Community** (*Kehillah*)

The Jewish Community Federation and Endowment Fund (The Federation) inspires, connects, and empowers our community as agents of collective change. Our 100-year history at the center of Bay Area generosity – supporting both those who give and those who benefit – grants us a unique ability to amplify results and create moments of transformation in the world, our community, and ourselves.

# Our personalized advice is tailored to you.

Hands off or hands held, our flexible approach can fit your needs.



Through the generosity of our donors, \$200 million is granted into the community each year, locally, nationally, and internationally, to a wide range of Jewish and broader causes in our community at-large. Donors have also entrusted us to manage over \$2.1 billion of philanthropic capital earmarked for future giving, creating an opportunity to invest those funds into our community. By focusing on grantmaking and growing assets invested in community, our goal is to ensure that resources are maximized towards change for a better world, within and beyond the Jewish community.

# Are you a philanthropist?

**If you give away anything of value, you are.**

Our philosophy is that philanthropy encompasses giving in many forms. Perhaps you'd like to give time, offer your talent, facilitate community connections, or make financial contributions. Federation Philanthropy Partners is committed to helping you develop a philanthropy plan customized to your values, passions, goals, and resources. From new donors starting their philanthropic journey to multi-generational family foundations, we work to create meaningful and effective giving strategies.



# We meet you where you are on your philanthropic journey.

Our point of view is that everyone can embark upon, or already has a philanthropic journey underway. You may just be starting to think about yourself as a giver. You may need targeted research for work you already do. You may need help identifying your goals. We meet you where you are.

Federation Philanthropy Partners helps a wide variety of individuals and families transform their world by aligning their giving to their goals. Here are some examples:

## **A young family looking to build deeper roots in the Jewish community.**

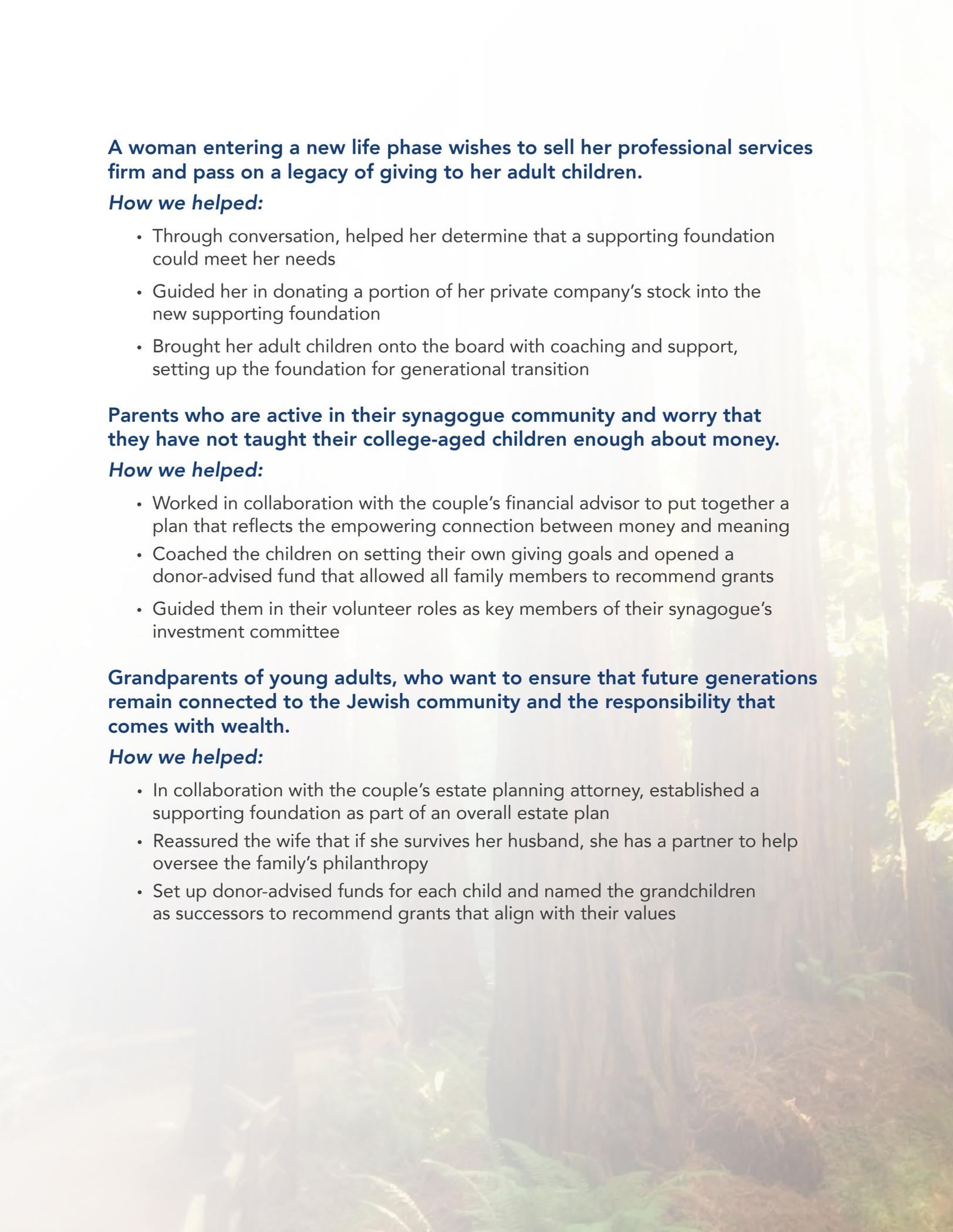
### ***How we helped:***

- Facilitated conversations to set their vision and mission for impact
- Recommended a donor-advised fund that provides a single flexible source to manage their philanthropy over time
- Introduced them to specific giving opportunities in their areas of interest, leading them to volunteer and enliven their connections to other Jewish families

## **A couple working for successful start-ups and looking to give in alignment with their shared values.**

### ***How we helped:***

- Led them through a brainstorming session about a local issue they want to address, and recommended appropriate organizations for giving
- Facilitated a collaborative funding opportunity allowing them to pool their resources with others in a joint philanthropic venture
- Structured a donation of appreciated stock from their start-ups that results in a lower tax bill (through a combination of charitable deductions and exclusion of capital gains)



**A woman entering a new life phase wishes to sell her professional services firm and pass on a legacy of giving to her adult children.**

***How we helped:***

- Through conversation, helped her determine that a supporting foundation could meet her needs
- Guided her in donating a portion of her private company's stock into the new supporting foundation
- Brought her adult children onto the board with coaching and support, setting up the foundation for generational transition

**Parents who are active in their synagogue community and worry that they have not taught their college-aged children enough about money.**

***How we helped:***

- Worked in collaboration with the couple's financial advisor to put together a plan that reflects the empowering connection between money and meaning
- Coached the children on setting their own giving goals and opened a donor-advised fund that allowed all family members to recommend grants
- Guided them in their volunteer roles as key members of their synagogue's investment committee

**Grandparents of young adults, who want to ensure that future generations remain connected to the Jewish community and the responsibility that comes with wealth.**

***How we helped:***

- In collaboration with the couple's estate planning attorney, established a supporting foundation as part of an overall estate plan
- Reassured the wife that if she survives her husband, she has a partner to help oversee the family's philanthropy
- Set up donor-advised funds for each child and named the grandchildren as successors to recommend grants that align with their values

# There's no prescribed way to be a philanthropist.

When thinking about your philanthropic journey, consider how you want to experience doing good in the world. Federation Philanthropy Partners offers a holistic approach that educates and inspires. In our first meeting, we learn about what motivates and inspires you, how you currently work with financial and tax advisors, and how we can help you achieve many philanthropic goals. Whether your needs include guidance on giving, research on specific issues, ways to invest in and connect to your community, or family legacy planning, we can help with your giving in order to enrich your life.

## **Guidance, partnership, and opportunity.**

We offer a collaborative partnership including webinars, educational events, opportunities to join others in philanthropy through giving circles, community connections, access to a contemporary, relevant point of view on Jewish philanthropy, and emerging social impact investment opportunities. We will meet you where you are, whether you are just learning about philanthropy or have an established tradition of giving.

# Our philanthropic vehicles can be tailored to your needs.

The underlying philanthropic vehicles we use to create customized plans include donor-advised funds and supporting foundations.

## **Donor-advised funds**

Our donor-advised fund is a flexible solution for your giving:

- Set up an account by contributing securities, appreciated assets, or cash
- Recommend grants to qualified organizations whenever you wish
- Invest the remaining donated assets to help with the goal of increasing assets to give over time
- Invest some of the assets in community investments, so that the money you've set aside for future giving is already supporting the community
- Establish successor advisors or a simple charitable bequest to ensure your legacy

## **Supporting foundations**

A supporting foundation is a separate charitable corporation or trust that has the tax-exempt status of a public charity. Endowed by an individual, corporation, or family, the donors may designate individuals to participate officially in the decisions of this charitable vehicle. While the donors may not control the foundation, they and their family members may have an active and perpetual role in the grantmaking and administrative decisions.

Federation Philanthropy Partners offers an integrated set of services which remove the administrative burden of running a foundation, enabling you to concentrate on the meaningful activities that create impact and change. Our services include tailored advice, grantmaking administration, tax and legal filings and administration, investment management and oversight, board meeting facilitation, and philanthropic education.

# Frequently Asked Questions

## What does it mean to give Jewishly?

Giving Jewishly means that we help our donors give through the perspective of four Jewish values: Taking Care of the Needy (*Tzedakah*), Healing the World (*Tikkun Olam*), Pursuing Justice (*Tzedek*), and Building Community (*Kehillah*). Our point of view is that you can give Jewishly to a very broad set of priorities, whether to specific Jewish causes or to issues in the community at-large.

## Do you only support Jewish causes?

We manage grants that support both Jewish and broader community causes. In fact, two-thirds of the \$200 million in assets that we grant into the community annually on behalf of our donors supports broader causes, both local and global.

## Why are your fees higher than commercially-sponsored donor-advised funds?

We provide a holistic partnership that includes experienced advisors, educational events, research, and networking opportunities. Our expertise and deep connections with Bay Area and Jewish communities add value for donors while we also reinvest fees back into the community. These differentiating factors, along with our level of service, provide a more complete and enriching solution than a donor-advised fund founded by a financial services company.

## What assets are good to donate?

Appreciated assets can be some of the best to donate because you may avoid capital gains tax liability as well as enjoy a current year tax deduction, if you itemize. We generally accept donations of a variety of appreciated assets such as publicly-traded and restricted stocks, real estate, shares in a privately-held company, tangible personal property, and some virtual currencies.

## I already work with an advisor. How can I work with you as well?

The Federation has a long history of collaborating with professional advisors, such as estate-planning attorneys, investment advisors, and wealth managers. We work closely with you and your advisor so that your giving is streamlined with your tax, investment, and estate planning strategies.

## What do the administrative fees pay for?

Federation Philanthropy Partners provides news, insights, education, and events that engage and inspire philanthropy. In addition to advice and guidance, we manage all grantmaking administration including due diligence, liquidating assets, sending grant checks, distributing quarterly and annual statements, and providing administration of the underlying platform for the efficient delivery of all these services.

## What is the difference between a donor-advised fund and a donation to the Federation?

A donor-advised fund is an account that facilitates your personal giving. From this account, you can recommend grants to the thousands of approved 501(c)(3) organizations (including the Federation) that support Jewish and broader community causes. Donors with donor-advised funds are not required to support the Federation, and while our philanthropy advisors are briefed on Federation initiatives and priorities should you be interested, they are not incentivized to “sell” you on a Federation donation.

## Here for the next 100 years.

The Jewish Community Federation and Endowment Fund inspires, connects, and empowers our community as agents of collective change.

Our century-old history at the center of Bay Area generosity – supporting both those who give and those who benefit – grants us a unique ability to amplify results and create moments of transformation in the world, our community, and ourselves. We will be here to steward your generosity well into the future.

## Ready to connect?

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