

2023 Impact at a glance

- **\$4.2 million**
• in Grants by Foundation
- **\$3.8 million**
• of Grants were to local organizations
(Jewish and secular)
- **\$79.8 million**
• Total Foundation assets

We can work together to achieve your clients' charitable giving goals. For more information contact **Lisa Stanger, J.D., LL.M.** 203.266.3084 lstanger@jewishnewhaven.org



Scan the QR code
to learn more



Jewish Foundation
OF GREATER NEW HAVEN

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newhavenjewishfoundation.org

- **SUPPORTING YOUR**
- **CLIENTS' CHARITABLE**
- **GOALS**
- For Professional Advisors



Jewish Foundation
OF GREATER NEW HAVEN

Smarter Giving. Your Way.

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The Jewish Foundation of Greater New Haven offers a full range of sophisticated charitable gift planning that will enable your clients to achieve their goals as effectively as possible.

Options include:

- **Donor Advised Funds:** Personal charitable giving accounts that may be opened for as little as \$10,000. Donor Advised Funds are easy to establish and are a great vehicle for “bunching” charitable contributions, especially gifts of appreciated stock, to maximize tax benefits.
- **Designated Funds:** Charitable funds designated for the organizations, programs or initiatives most important to your client.
- **Retirement Plans and Charitable Gifts:** Charitable giving from IRAs can provide significant tax-savings (both during your client’s lifetime as well as if designated for charity at their passing).
- **Planned Gifts:** Bequests, gifts of life insurance, as well as charitable gift annuities and charitable lead and remainder trusts remain tax-smart choices for charitable planning.
- **Philanthropic and Charitable Advising:** We can help facilitate and craft gift plans. Your client can even make arrangements to establish a singular fund at the Foundation that can provide ongoing support to multiple charitable causes.

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The Foundation’s attention to personal service is unmatched in our field. We will always strive to exceed your - and your clients’ - expectations.

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Outstanding service is your top priority. It’s also ours.

For years, the Jewish Foundation of Greater New Haven has partnered with advisors like you to ensure that your clients are able to make the most meaningful charitable impact in the smartest, most tax-advantaged manner.

We support your clients through:

- Converting non-cash assets such as securities, real estate, partnership interests and other non-liquid assets into charitable dollars.
- Matching interests with charitable needs in the Jewish and general communities.
- Facilitating productive family philanthropy conversations.
- Customizing unique philanthropic strategies that emphasize individual goals.