



Jewish Foundation
OF GREATER NEW HAVEN



DONOR ADVISED FUNDS with the Jewish Foundation of Greater New Haven

Create a Gift that Keeps on Giving

A donor-advised fund with the Jewish Foundation is a smart giving tool that helps you organize your giving, maximize tax benefits, and make your giving more effective.

It's like having your own charitable foundation - with better tax benefits, a much lower cost, and without all the paperwork.

How it Works:

- Start your fund with a simple agreement, which can be completed in minutes. The donor may be an individual, a family or a corporation.
- Make additional tax deductible contributions at any time.
- Recommend distributions to charities you want to support.
- The Foundation handles all administrative responsibilities, freeing you to focus on the joy of giving.
- Pass on to your children the right to recommend distributions from your fund.

Assets You Can Use:

- Marketable Securities
- Bequests
- Mutual Funds
- Bonds (corporate, municipal or State of Israel)
- Insurance Policies
- Remainder or Lead Interest of a Charitable Trust

Maximum Tax Advantage

Donations qualify for a fair-market-value tax deduction for each contribution you make to a donor-advised fund.

When you contribute securities, you may also avoid capital gain taxes.

Active Involvement

You and your family identify specific charities and (recommend distributions to support them). Your fund can be used/to support causes and organizations in the community at large and the Jewish community.

No Limit on Number of Distributions

The Foundation can issue an unlimited number of grant distribution checks from your fund.

Build a Permanent Family Legacy

Your fund can be the first step toward building a permanent legacy. You may designate your children, or name anyone, to recommend distributions, ensuring the next-generation family's participation.

Philanthropy for the Entire Family

Distributions issued from your family's fund may carry your family's name. It's a gift that can keep on growing.

Once it's established, anyone can make tax-deductible contributions to your fund at any time, in any amount.

To Celebrate a Milestone or Honor a Loved One's Memory

If you or someone you love is celebrating a special occasion, establish a donor advised fund or add to an existing one to mark this important milestone.

Administration

All recommended distributions must be directed toward 501(C)(3) organizations that are U.S. public charities. Grants from a fund cannot result in the donor receiving an exchange of goods or services. Prohibited benefits include tuition, tickets and membership. Grants cannot be used to satisfy all or a portion of a pre-existing personal pledge or other financial obligation of the donor.

HOW IT WORKS:

1 Establish a special charitable fund in your name with the Jewish Foundation

2 Contribute cash or appreciated securities

3 Foundation sells the assets and credits your fund with the sale proceeds

4 You receive a tax receipt for charitable deduction purposes no capital gains taxes are payable.

5 The proceeds are invested and continue to work for you, tax free

6 Recommend distribution to qualified charities — at your convenience

Questions? Call us! We're here to help. Lisa Stanger (203) 387-2424 x382 lstanger@jewishnewhaven.org

WHAT DO YOU WANT TO DO JEWISHLY & HOW CAN WE HELP?

newhavenjewishfoundation.org