



Jewish Community  
Foundation OF GREATER METROWEST NJ

# DONOR ADVISED FUND

Jewish Community Foundation of Greater MetroWest NJ  
901 Route 10 | PO Box 929 | Whippany, NJ 07981-0929

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## What Is a Donor Advised Fund?

A simple, flexible, and tax-efficient way to give to your favorite charities

Creating a donor advised fund (DAF) at the Jewish Community Foundation of Greater MetroWest NJ (JCF) is smart way to organize your giving. You can make grants to multiple qualified charitable organizations of your choice from a single contribution to your fund, while taking advantage of the highest charitable tax deduction available.

If you wish to involve your children and grandchildren in your philanthropy, a DAF offers a less expensive alternative to creating a private family foundation. Because you recommend the organizations most meaningful to you, a DAF is an especially personal way to make an impact on communities and people in need – now and in the future.

## Why establish your donor advised fund at JCF?

**We provide personal service.** The members of our professional staff will get to know you and your fund, and we can assist you with your charitable giving by phone, online, or in person. You'll always get a quick response to your grant recommendations. We issue distributions weekly and we accommodate urgent requests to the best of our ability.

**You'll benefit from the best tax advice and the latest information.** As soon as you establish your fund, you'll receive an income tax deduction for your donation. We'll stay in touch through regular communications, our website, and special seminars, keeping you informed about the latest legislative and regulatory updates and other developments that interest you.

**We help you leverage your giving.** We know you want to maximize the effectiveness of your philanthropy. Assets in your fund grow tax free, so more is available for the organizations you support. We'll connect you with other donors with similar interests and keep you posted on opportunities to partner with them.

**We'll manage your fund effectively.** Members of the JCF investment committee – all of whom serve as volunteers – closely oversee the investment managers we employ. You can choose an investment allocation strategy for your fund from a number of JCF investment pools (equity, fixed, money market). Funds with a minimum of \$250,000 can participate in JCF's Managed Pool, a diversified, multi-asset portfolio.

## How Does It Work?

To begin, choose a name for your fund. You can name a fund for yourself, a loved one, or something that is meaningful to you.

Next, make a gift of cash, securities, or other property to the Jewish Community Foundation of Greater MetroWest. You can establish a DAF with a minimum gift of \$5,000, and you can make additions to your fund at any time, in any amount.

Finally, notify your philanthropic advisor at JCF of your recommendations for charitable distributions to qualified public charities. You can recommend grants as frequently or infrequently as you choose, for amounts starting at \$100.

If you want to make a charitable contribution now but aren't sure which charities you want to support, create a DAF and take your time. Your advisor can help you choose charities that match your philanthropic interests.

JCF will invest and administer your fund's assets, verify the tax status and mission of all charitable organizations that receive grants, process recommendations, mail checks to recipient organizations, and send you regular reports. With our secure, easy-to-use online portal, you can check your fund balance and contribution history and set up new or recurring grant recommendations at your convenience.

## What Are the Benefits?

A DAF enables you to support the causes you care about most, without having to track receipts from multiple charities. The experts at JCF can help you identify qualified charities that best align with your personal interests and philanthropic goals.

DAFs are simple to establish and can be built using a wide variety of assets. The assets in your fund grow tax-free, generating greater resources to support the causes you care about. You do not pay tax on the income generated by your fund. But because your contributions are charitable donations to 501(c)(3) tax-exempt public charities, you are entitled to receive the maximum tax deduction allowed by law for your initial gift and all subsequent gifts to the fund. If you use appreciated securities or property to establish or augment the fund, you can realize additional tax savings.

You can involve other family members as recommenders, showing them the value of philanthropy and demonstrating to them the importance of taking care of the Jewish community. If you prefer, you can preserve your privacy: a DAF is not required to publicly disclose the grantmaking activities of individual donors, and grants may be made anonymously.

The most gratifying benefit is that your investment in the future of our Jewish community ensures that it will remain vibrant for generations to come.

Creating a Donor Advised Fund with JCF is a smart investment—for you, your loved ones, and your local and global Jewish and secular communities.

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FOR MORE INFORMATION, PLEASE CONTACT:

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