

Investing in our Future

The Ottawa Jewish Community Foundation serves an essential purpose for those who are passionate about the future. Foundation can help fulfill your aspiration to be an impactful philanthropist, at every stage of life or wealth. With the guidance and acumen of our Foundation team, you can make a difference and build a legacy to enrich our community, today and for generations to come.



OTTAWA JEWISH
COMMUNITY FOUNDATION

A History of Growth

The Foundation was founded November 19, 1971 by visionary leaders with the goal of securing the future financial stability of Ottawa's Jewish community institutions. Since that time, the Foundation has grown exponentially and now has assets worth over \$80M. The Foundation also has nearly \$45 million in future expectancies from roughly 300 insurance policies or known bequests.

Currently there are over 1000 named funds. Since 2002, donors have used the Foundation to distribute roughly \$40M to support charities that they care about, over 95% of which are Jewish.

Foundation's exceptional investment returns, such as average returns of 8.5% over 10 years, and 6.4% over five years, mean that the disbursements will only continue to grow over time, ensuring that funds provide perpetual support to these important causes.

The Power of Investing in the Community

In 50 years, the Foundation's funds under administration have increased from \$100K to \$80M and growing.



Total Assets

BE AN IMPACTFUL PHILANTHROPIST

Foundation has several different giving vehicles to best meet donor needs. Through a discussion with our professionals, we can help find the best vehicle for you so that you can achieve your own unique desire to make a difference.

Some of the most common methods include:

Endowment Funds

The Foundation provides an opportunity to set up an endowment fund to support the charity or charities of your choice. Whatever your passion – Jewish education, helping the vulnerable, or something else entirely – your endowment fund will support the causes near and dear to your heart. The Foundation specializes in permanently endowed funds to support the charity or charities of your choice. Each year the Foundation will disburse a fixed amount to the causes you care about and because of prudent investing and industry leading low fees, the fund will continue to grow perpetually. Opening a fund can be very simple and the Foundation can work directly with you and your financial planner to maximize both your gift and your tax benefits.

Legacy Gifts

While the Foundation specializes in permanent endowments, we do offer a hybrid option, **Living Legacy Funds**, for funds that are opened with over \$100K. These funds have half the capital permanently endowed, while the other half can be encroached upon at the donor's discretion. A legacy gift most often takes the form of a bequest in your will, designating a portion of your estate to create an endowment fund to support the cause or causes you choose, or the needs of the community in general. Through careful estate planning, you can make a gift to the community and at the same time provide for your family.

Our **Legacy Challenge** makes this easy as the Foundation will pay your legal costs of up to \$1,000 when the Foundation is made a beneficiary of your estate in the minimum amount of \$10,000 or 1% of your estate.

Gift an Insurance Policy

An insurance policy can be gifted, or the Foundation can be made a beneficiary to establish a permanent endowment. Insurance policies are attractive for several constituencies, as they are relatively inexpensive for younger donors, and existing, paid up policies that may have supported a business or partnership may be an ideal giving vehicle for others. All donations and premiums generate a charitable receipt.

There are many other ways of giving, such as the gifting of shares; please contact us to discuss how best to realize your philanthropic passion.



FOUNDATION'S GUIDING PRINCIPLES

Determined Leadership

The Foundation exercises innovative leadership, focused on respecting donors' rights, desires and aspirations.

Trusted Stewardship

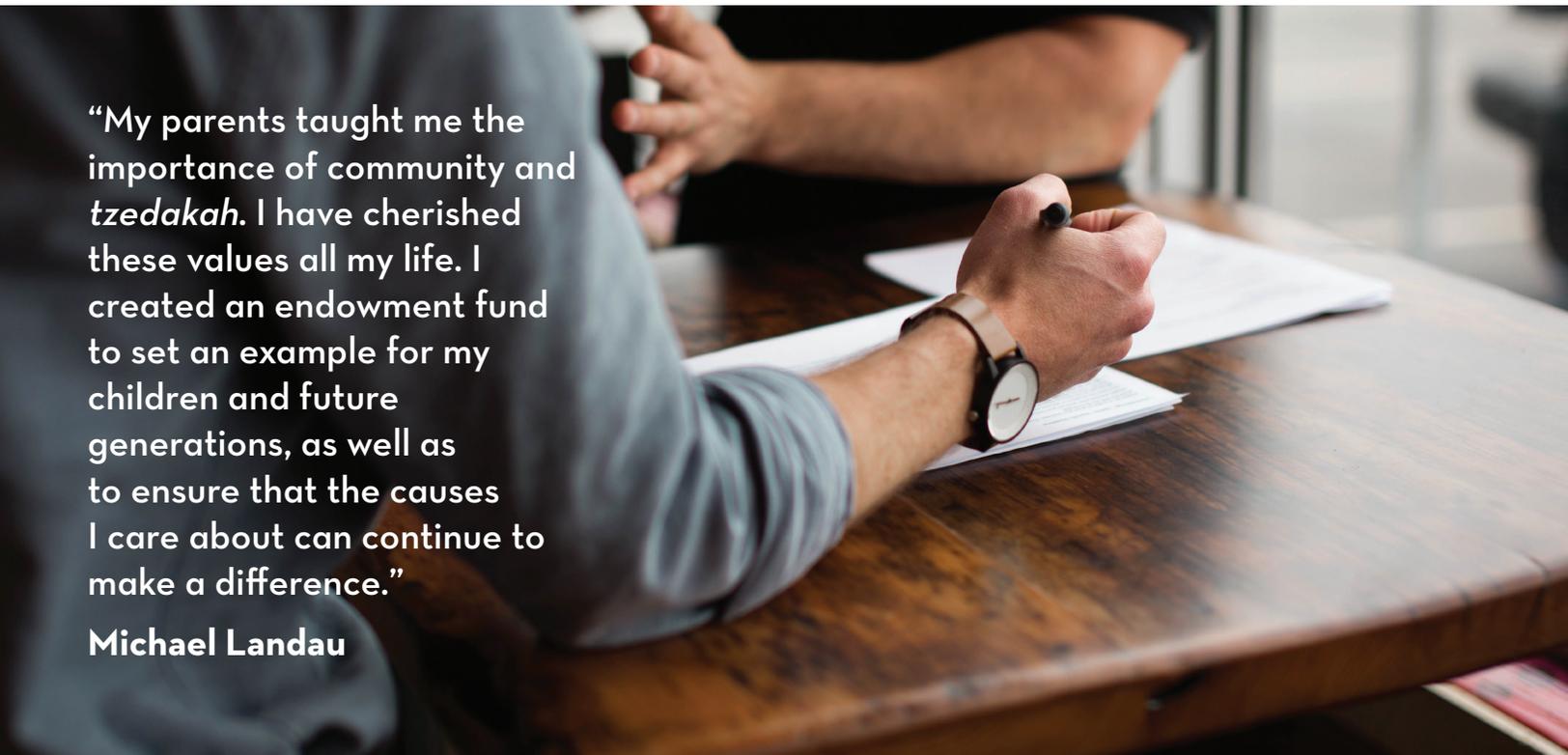
The Foundation benefits from robust, expert management and oversight from committed volunteers and paid professionals. This mixture has produced significant annual returns while keeping administrative fees low. Thanks to this high level of oversight, the Foundation has produced excellent returns averaging 8.5% net of all fees over the last 10 years. This allows your impact to increase each and every year and ensures that your legacy will be there now and for the future. **The Foundation is committed to the responsible and transparent stewarding of all assets entrusted to us.**

Jewish Values

The Foundation's Jewish values of *tikun olam*, *tzedakah*, and *L'dor va'dor*, shape and direct our mission to strengthen the Ottawa Jewish community. These values inspire us to work with all people in a collaborative, compassionate and respectful manner.

Commitment to Excellence

The Foundation strives for excellence in all aspects of our work, which fosters trust with donors that we will meet their philanthropic goals.



“My parents taught me the importance of community and *tzedakah*. I have cherished these values all my life. I created an endowment fund to set an example for my children and future generations, as well as to ensure that the causes I care about can continue to make a difference.”

Michael Landau

Mission Statement

The **Ottawa Jewish Community Foundation** provides donors the vehicle to contribute to the long-term financial stability and support of the needs of the agencies which serve the Ottawa Jewish community.

The Foundation acts as a steward for these gifts and links the past, the present and the future while building trust with everyone we serve.

Vision Statement

As a trusted leader and the centre of Jewish philanthropic giving, the Foundation will engage, educate and inspire generations of donors, ensuring the long-term security and financial viability of Ottawa's Jewish community.

Investing in Our Future

There is an expression that says:
The songs of our ancestors are the songs of our children.

This speaks directly to the Foundation's work to secure our community's future, to guarantee that song continues, beautiful and strong for generations to come. Creating a meaningful legacy is at the heart of our mission. But we couldn't do this without your generosity; your philanthropy makes this legacy possible.

Thank you for your support.



For more information, please contact Michael Reznick at
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