



The Jewish Federation  
OF WESTERN MASSACHUSETTS  
Serving Hampden, Hampshire & Franklin Counties

JEWISH ENDOWMENT  
FOUNDATION

## DONOR ADVISED FUND

CREATE A JEWISH LEGACY

A donor advised fund enables you to take an active role in providing resources to meet needs in the Jewish and general communities. It's an easy and satisfying way to better manage and organize your philanthropy.



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Recommend  
support for  
causes of  
specific interest  
to you now and  
in the future.

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*For additional information, contact us at 413.737.4313. All inquiries are confidential.*

This material is presented for informational purposes only and should not be construed as legal, tax or financial advice. When considering gift-planning strategies, you should always consult with your own legal and tax advisors.

*Jewish Federation of Western Mass  
1060 Dickinson Street  
Springfield, MA 01108*

## What is it?

- A donor advised fund is a named fund of the Jewish Endowment Foundation that allows you to recommend grants to qualified charitable organizations of your choice, take advantage of the highest charitable tax deduction available and make your charitable giving simple, effective and satisfying.
- The fund can be established with a minimum gift of \$5,000, with the opportunity to make additions at any time.

## How does it work?

- You make a gift of cash, securities or other property to the Federation to establish a named fund.
- You make recommendations for charitable distributions from the fund with a minimum amount of \$100 to qualified public charities. The Federation verifies the tax status and mission of all charitable organizations that receive grants.
- The Federation invests and administers the fund's assets, processes recommendations, mails checks to recipient organizations and sends you regular reports.
- You may designate a successor advisor to continue your philanthropy into the next generation

## What are the benefits?

- You are able to recommend support for causes of specific interest to you now and in the future.
- You can receive an immediate charitable income tax deduction for the initial gift to the Federation and for all subsequent gifts.
- You can receive additional tax savings if you use appreciated securities or property to establish or augment the fund.
- You do not pay income tax on the income generated by the fund.
- You can involve other family members as advisors, showing them the importance of philanthropy.
- You invest in the future of the Jewish community.
- You perpetuate your beliefs and serve as a role model for future generations.
- You can take advantage of our expert advice by partnering with the Federation to make the world a better place.