



## B'nai Tzedek Youth Philanthropy Program Fund Agreement

It is my intention to convey certain properties to the Jewish Federation & Foundation of Northeast Florida. This conveyance will constitute an outright contribution by me to the Jewish Foundation to be used in carrying out its general charitable purposes. The Fund shall be held and distributed upon the following terms and conditions.

1. A fund shall be established as a component fund of the Jewish Foundation, which shall be known as the B'nai Tzedek Fund (the "Fund"). The Fund will be subject to the bylaws and policies of the Federation.
2. **For the first twenty years, distributions from the fund shall be used only to support Jewish 501 (c)(3)'s in the northeast Florida area.** The Jewish Foundation's Board shall reserve the right to make exceptions. After twenty years, the Fund will be converted to a permanent Endowment Fund of the Jewish Federation & Foundation of Northeast Florida in the name of the student. It must meet the minimum balance then required by the Jewish Foundation and will be regulated by the then current bylaws of the Jewish Foundation.
3. The Fund shall include the property delivered by the Donor, such property as the Donor may from time to time transfer to the Jewish Foundation subsequently for inclusion in the Fund, such property as may from time to time be received by the Jewish Foundation from any other source and accepted by it for the inclusion in the Fund and all undistributed income from the foregoing property (hereinafter referred to as the "Fund").

**The first \$125 contributed will be matched in the following manner:**

- A. **\$125 by the Jewish Federation & Foundation of Northeast Florida**
- B. **\$250 from the Gottlieb Family Donor Advised Fund**

4. The Jewish Foundation may recognize the Donor for his/her gift through different media outlets, which may include Jewish Foundation Publications, news releases, certificates or plaques.
5. The Jewish Foundation shall hold, manage, invest, and reinvest the Fund, shall collect the income for charitable purposes, in accordance with the provision specified in the governing instruments of the Jewish Foundation, as from time to time amended, in accordance with the standards set forth in the Florida Uniform Prudent Management of Institutional Funds Act, from time to time amended, and as determined by the Board of Trustees of the Jewish Foundation (the "Board"), all of which are hereby incorporated by reference and conclusively assented to and adopted. The determination of the Board shall prevail in the case of conflict between sources.
7. The Jewish Foundation shall withdraw from the Fund an amount determined by its Board from time to time, as reasonable and proper compensation for its services and expenses in administering the Fund.
8. The Fund shall not be restricted by the Donor, either directly or indirectly, to any material restriction or condition as described in the regulations under Section 170 of the Internal Revenue Code of 1986, as amended.
9. Nothing in this Agreement shall affect the status of the Jewish Foundation as an organization described in section 501 (c)(3) of the Internal Revenue Code of 1986, as amended, and as an organization which is not a private foundation within the meaning of section 509 (a) of the Internal Revenue Code of 1986, as amended. This Agreement shall be interpreted in a manner consistent with the foregoing intentions and so as to conform to the requirement of the provisions of the federal tax law and any regulations issued pursuant thereto. The Jewish Foundation is authorized to amend this agreement to conform to the provisions of any applicable law or government regulation in order to carry out the foregoing intention. References herein to provisions of the Internal Revenue Code of 1986, as amended, shall be deemed references to the corresponding provisions of any future Internal Revenue Code.

# B'nai Tzedek Youth Philanthropy Program Fund Agreement

<b>Student's Information</b>		
Name:		
Signature:		
Current address:		
City:	State:	ZIP Code:
B'nai Mitzvah Date:	Date of Birth:	
Synagogue / Temple:		
E-mail:	Phone:	
<b>Signature of Parent or Guardian</b>		
Name:		
Signature:	Date:	
E-mail:	Phone:	
<b>Signature of Parent or Guardian (if applicable)</b>		
Name:		
Signature:	Date:	
E-mail:	Phone:	

Please mail this completed form and your check for \$125 payable to the (insert child's name) B'nai Tzedek Fund:

***Jewish Foundation of Northeast Florida***  
***Attn: Emma Pulley***  
***8505 San Jose Blvd.***  
***Jacksonville, FL 32217***