



HOW CAN I CONTRIBUTE?

Checks: Make checks payable direct to your fund. For example: *“The Brown Family Donor Advised Fund”*

Mail your check to: **Jewish Foundation of Northeast Florida**
Attn: Kellie Smith
8505 San Jose Blvd. Jacksonville, FL 32217

Credit Card: Gifts by credit card are accepted, however a 2.7% transaction fee is charged to cover the cost to the Foundation/Federation. We accept Visa, Mastercard, Amex, & Discover if you are looking to earn more points by year's end!

Gifts by Stock, Wire or ACH Transfer: If you are interested in making a gift by stock, wire, or ACH please give these instructions to your broker or financial institution. When you have initiated this request, please have your broker or financial institution call or email us to let us know when the transfer is being completed and we will alert SEI to accept and deposit the funds into your fund.

SEI STOCK TRANSFER INSTRUCTIONS:

DTC Participant # **2039** – **SEI Private Trust Company** Agent Internal Account Number: **11102-C**
Interested Party Account Name (or also known as further credit): Jewish Federation of JAX/JCF of NE
FL – CONTRIBUTION Tax ID: 59-0637864
Interested Party Account Number (also known as for further credit): 17250 – CONT

SEI WIRE TRANSFER INSTRUCTIONS:

Wells Fargo Bank
Philadelphia, PA
ABA #: 121000248
Account #: 2000003418367
SEI Private Trust Company

SEI ACH* TRANSFER INSTRUCTIONS:

Wells Fargo Bank
Philadelphia, PA
ABA #: 026012881
Account #: 2000003418367
SEI Private Trust Company

** ACH payment is only available for transactions less than \$100,000 and the payment is initiated by the client.*

IRA Distributions: Distributions from IRAs to charities avoid income tax in both life and death and when distributed upon death avoid estate tax. People older than 70½ can transfer up to \$100,000 per year from their traditional IRAs to charity, which can count as the required minimum distribution but is not taxable if they follow the rules for a qualified charitable distribution. IRA assets can be used during life to establish or fuel an endowment fund in your name that will produce gifts annually for years to come.

**IRA assets cannot be gifted for DAF accounts unless endowed.*

WHAT ARE THE BENEFITS?

TAX DEDUCTION

You will receive an immediate charitable income tax deduction for contributions made to your Fund. You may contribute through cash or transfer long-term appreciated property. (When you transfer appreciated property, you receive the greatest tax benefit by avoiding paying capital gains tax.) You may also contribute through credit card, check, wire, or IRA.

STREAMLINE GIVING

By organizing your charitable giving through one source, you avoid writing separate checks to multiple organizations and eliminate cumbersome record keeping. You can simply focus on the joy of giving.

SUPPORT THE GROWTH OF A PHILANTHROPIC COMMUNITY

Your partnership enables the Federation to provide philanthropic education programs which help inform donors about critical issues within the community and help develop the next generation of givers. Having your Fund with the Federation helps secure the future of our Jewish community.

CREATE A LEGACY OF CHARITABLE GIVING

You can name your children, grandchildren, or others as successor advisors to your Fund. Successor advisors have the privilege of managing your Fund after your death and carrying on your philanthropic values and traditions.

Sample Bequest of Remainder of Estate

"I give, devise, and bequeath to the Jewish Federation & Foundation of Northeast Florida for the benefit of the (INSERT NAME) Fund TAX I.D. #59 063 7864, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal. The Jewish Federation & Foundation of Northeast may be contacted in care of its Foundation office 8505 San Jose Blvd Jacksonville, FL 32217 904-512-3796."

Sample Bequest of Specific Amount

"I give, devise, and bequeath \$_____ (or state the property such as the remaining value of an IRA) to the Jewish Federation & Foundation of Northeast Florida TAX I.D. #59 063 7864, this gift is for the benefit of the (INSERT NAME) Fund. The Jewish Federation & Foundation of Northeast Florida may be contacted in care of its Foundation office at 8505 San Jose Blvd Jacksonville, FL 32217 904-512-3796

**These are merely suggestions as to content and should be written or adapted by legal counsel to fit the contributor's individual situation.*

For more information please contact Kellie Smith at (904) 512-3796 or kelliek@jewishjacksonville.org