

HOW CAN I CONTRIBUTE TO AN EXISTING or NEW FUND?

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

Mail your check to: **Life and Legacy Division - Jewish Federation of Jacksonville**
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, MC, Amex, & Discover if you are looking to earn more points by year end!

Gift Stock: If you are interested in making a gift of stock please give these instructions to your broker. When you have initiated this request please have your broker call or email us to let us know when the stock 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**

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 FOR 2019

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 Life and Legacy Division of the Federation (former Foundation) 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 within the Jewish community helps secure Jewish tomorrows by providing a community approach to Legacy planning for everyone in our 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.

For more information contact Kellie Smith at (904) 512-3796 or by email Kelliek@jewishjacksonville.org