

A photograph of a young man and woman smiling and embracing each other outdoors. The woman is wearing a yellow top and the man is wearing a blue shirt. They are both looking towards the camera.

# DONOR ADVISED FUNDS

## Philanthropy made easier

**A CJP Donor Advised Fund (DAF) enables you to streamline and maximize your charitable giving. By offering the convenience and flexibility you need, a CJP DAF is the smart choice for busy philanthropists.**

### **WHAT IS A CJP DONOR ADVISED FUND?**

A DAF is a charitable giving fund that you create with CJP. After completing a simple enrollment application, you make an irrevocable gift of cash, securities or other assets in the amount of \$2,500 or more. You select an investment option that meets your needs, and then begin recommending grants to the charities that matter most to you. Each grant recommendation is carefully reviewed to ensure compliance with IRS regulations and CJP policies. You can recommend grants and monitor your DAF online, and CJP will provide you with quarterly reports detailing all activity in your DAF.

### **DISTINCT ADVANTAGES**

What sets a CJP DAF apart from other Donor Advised Funds or a family foundation?

**Convenience**, including secure online access.

**Low minimums.** Our minimum initial contribution of \$2,500, minimum balance of \$1,000 and minimum grant of \$50 are significantly lower than most other Donor Advised Funds.

**The opportunity to support the causes that matter most to you.** You can recommend grants to a wide range of organizations, from medical and educational institutions, to arts organizations and Jewish agencies. You can even fulfill your synagogue dues with a DAF grant.

**Personalized customer service.** Our knowledgeable staff is always available to assist you.

**Lower fees** and sound investment options to help you maximize your charitable impact.

**An ideal vehicle for engaging your family in philanthropy.** A CJP DAF can be a good alternative to a family foundation, with greatly improved privacy and fewer administrative expenses.

## Flexibility to meet your needs

CJP offers a menu of four carefully managed investment options for your DAF: money market, fixed income, equity and balanced (fixed income and equities). You may choose one or more of these options, and change them as your philanthropic priorities, timelines and interests develop.

DAFs with assets in excess of \$500,000, subject to certain other requirements, may be eligible to participate in the Jewish Community Endowment Pool, LLP (JCEP). This option allows you access to the same sophisticated investment portfolio, intended for the long-term growth of philanthropic capital, which CJP uses for its own permanent endowment.

## How do I establish a DAF with CJP?

To establish your CJP DAF, simply call and request a copy of our Donor Advised Fund Kit, or find the application packet and more information online at [cjp.org/daf](http://cjp.org/daf)

## Support what matters most to you with a CJP DAF.



## A GREAT CHOICE FOR ALL KINDS OF PHILANTHROPISTS

### Among our satisfied DAF program participants are:

A newly married couple eager to practice *tzedakah* together and make philanthropy part of their lives.

A busy professional who wishes to focus on the organizations that are important to her, and let CJP do the paperwork.

A community leader who supports dozens of charities each year, but wishes to receive only one tax receipt.

A former family foundation president who gives anonymously and at a lower cost because she transferred her foundation to a CJP DAF.

A loyal donor who has left instructions that her DAF pay bequests to her favorite charities upon her passing.

## LEARN MORE:

**Charles S. Glassenberg, Vice President**  
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*You can give with confidence. CJP has received the highest 4-star rating from Charity Navigator, reflecting our efficient and fiscally responsible management.*

*CJP welcomes the participation of interfaith couples and families, and people of all abilities, backgrounds, and sexual orientations.*



Make a bigger difference.

**Combined Jewish Philanthropies**  
617.457.8500 | [cjp.org](http://cjp.org)