

Donor Advised Funds

A financially sensible way for your clients to support the charities of their choice.

**JEWISH
FOUNDATION**
of GREATER TORONTO

CREATED FOR PROFESSIONAL ADVISORS

WHAT IS A DONOR ADVISED FUND?

A donor advised fund (DAF) is a formally structured vehicle for charitable giving that enables donors to recommend which initiatives and charities will receive their donations each year. A DAF's flexibility allows someone to set aside tax-receipted dollars now and enjoy growth for future philanthropy.

The assets of the DAF grow tax-free. Since a DAF is a part of the Jewish Foundation, all the contributions into the fund qualify for the favourable tax rules that apply to public charities.

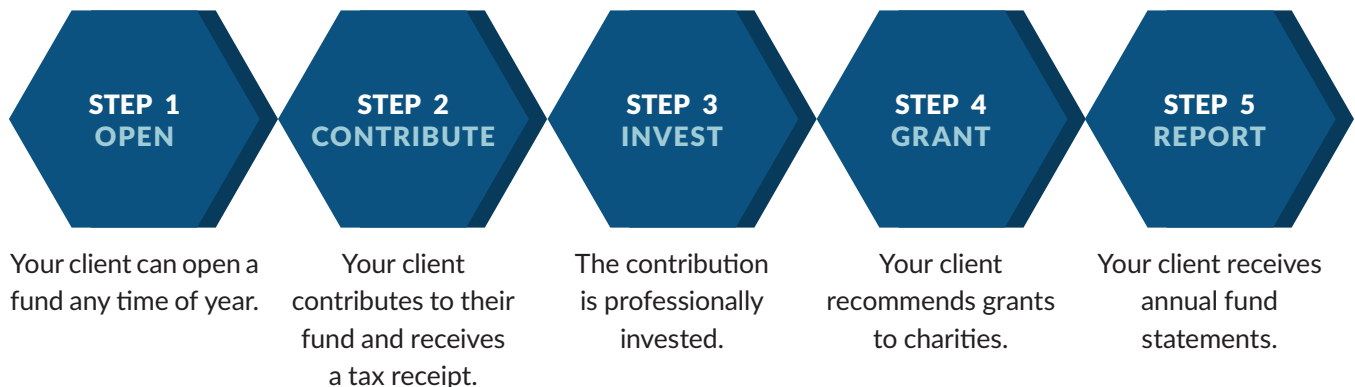
BENEFITS OF A DAF AT THE JEWISH FOUNDATION

- Initial balance of \$10,000
- Low administration fees
- Anonymity and privacy, if desired
- Flexibility and ease
- Professional and customized support of a philanthropic advisor
- No minimum for annual contributions or distributions
- No CRA filing
- Succession planning
- Community knowledge and expertise

WHAT IS THE JEWISH FOUNDATION?

The Jewish Foundation of Greater Toronto works to sustain the Jewish community for the long-term by partnering with individuals, families, advisors, and organizations to achieve their philanthropic goals. By contributing to the Foundation and its pooled assets, donors can have an even bigger impact on the causes that mean the most to them.

HOW DAFs WORK AT THE JEWISH FOUNDATION



INVESTMENTS

The Jewish Foundation's pooled assets are invested in accordance with an investment policy designed to produce long-term returns with a reasonable level of risk. Our Investment Advisory Committee is made up of seasoned professionals who prudently invest, manage, and monitor the portfolio in alignment with the Foundation's mission.

7.4%
annualized rate of return
over 10 years
(as of June 30, 2025)

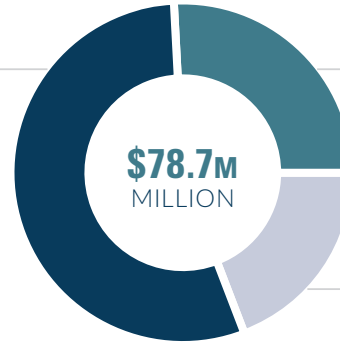
JEWISH FOUNDATION FINANCIAL HIGHLIGHTS

GRANT DISTRIBUTIONS

(FOR THE YEAR ENDED JUNE 30, 2025)

\$43.5M

STRATEGIC
JEWISH
COMMUNITY
PRIORITIES



\$20.2M

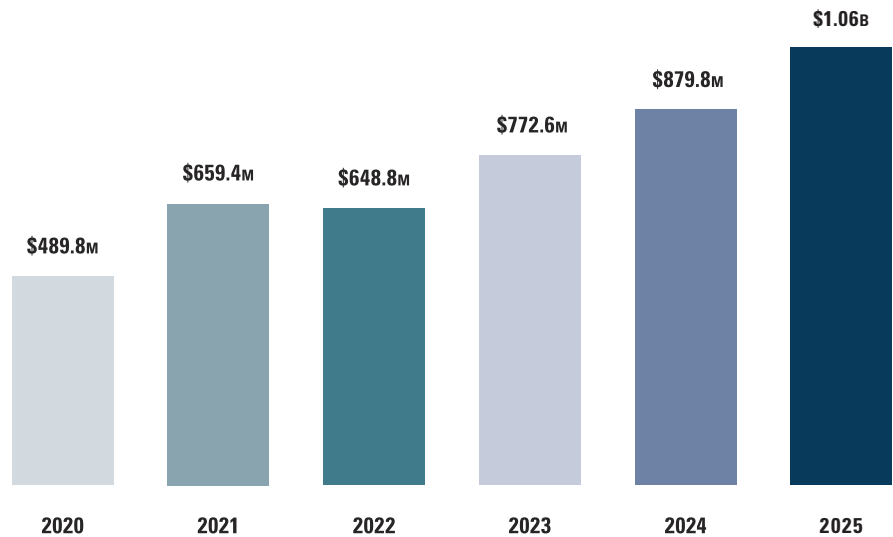
OTHER JEWISH
ORGANIZATIONS

\$15.0M

NON-JEWISH
ORGANIZATIONS

ASSETS UNDER MANAGEMENT

116% INCREASE OVER 5 YEARS



COMPARING DIFFERENT TYPES OF FOUNDATION INSTITUTIONS

JEWISH FOUNDATION	PRIVATE FOUNDATION	FINANCIAL INSTITUTION
Anonymity options vary	Public filings	Anonymity options vary
<ul style="list-style-type: none"> No upfront fees Admin fees 1% and lower Average investment management fee from 0.5-0.6% No CRA filing 	<ul style="list-style-type: none"> Fees for investment management, legal, audit, bookkeeping, and tax returns Annual CRA filing 	<ul style="list-style-type: none"> Admin and investment management fees can total more than 2.5% No CRA filing
Minimum \$10,000 balance (\$5,000 for those under 45)	Typically a \$1,000,000 - \$3,000,000 minimum balance	Varies, but typically \$10,000-\$100,000 minimum balance
<ul style="list-style-type: none"> No minimum annual contributions No minimum annual distributions 	<ul style="list-style-type: none"> Minimum contributions vary Minimum 5% annual distributions 	<ul style="list-style-type: none"> Minimum contributions vary Typically minimum 5% annual distributions
Assets are pooled and invested by professional investment managers and monitored by an Investment Advisory Committee	Directors or trustees must manage investments directly or supervise professional managers	Often limits investments to a bank-owned investment product, managed by a single advisor

**CONTACT US TODAY FOR MORE INFORMATION
ON WHAT WE CAN DO TOGETHER.**

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UJA FEDERATION | **JEWISH**
of Greater Toronto | **FOUNDATION**