

DONOR ADVISED FUND

CREATE A JEWISH LEGACY

A donor advised fund enables you to take an active role in providing resources to meet needs in the Jewish and general communities. It's an easy and satisfying way to better manage and organize your philanthropy.



Jewish Federation
OF MADISON

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.

www.JewishMadison.org
(608) 278-1808

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**Recommend
support
for causes
of specific
interest to you
now and in the
future.**

For additional information, contact Lynn Kaplan, Financial Resource Development Director at (608) 442-4076. All inquiries are confidential.

This material is presented for informational purposes only and should not be construed as legal, tax or financial advice. When considering gift-planning strategies, you should always consult with your own legal and tax advisors.

What is it?

- A donor advised fund is a named fund of the Jewish Federation of Madison that allows you to recommend grants to qualified charitable organizations of your choice, take advantage of the highest charitable tax deduction available and make your charitable giving simple, effective and satisfying.
- The fund can be established with a minimum gift of \$25,000, with the opportunity to make additions at any time.

How does it work?

- You make a gift of cash or securities to the Federation to establish a named fund.
- You make recommendations for charitable distributions from the fund of a minimum of \$100 to qualified public charities (must maintain a \$5,000 minimum balance). The Federation verifies the tax status and mission of all charitable organizations that receive grants.
- The Federation administers the fund's assets, processes recommendations, and mails checks to recipient organizations.
- You and designated current and/or successor advisors, if any, may recommend grants from both income and principal.

- Remaining assets in the fund upon your death or your successor advisors' deaths are added to the Federation's unrestricted endowment fund to help the Federation meet future needs.

What are the benefits?

- You are able to recommend support for causes of specific interest to you now and in the future.
- You can receive an immediate charitable income tax deduction for the initial gift to the Federation and for all subsequent gifts.
- You do not pay income tax on the income generated by the fund.
- You can involve other family members as advisors, showing them the importance of philanthropy.
- You invest in the future of the Jewish community.
- You perpetuate your beliefs and serve as a role model for future generations.