

WHY DONATE VIA DONOR-ADVISED FUND

A donor-advised fund is a simple, tax-effective way to support your Jewish community.

Think of a donor-advised fund as your charitable bank account. When you contribute cash, securities, or other assets to your DAF, you are eligible to take an immediate tax deduction. Those funds can be invested for tax-free growth, and you can recommend grants to any IRS-qualified public charity, including UJF.

IT'S TAX-EFFICIENT

- Receive an immediate tax deduction with each contribution
- Invest the balance and the proceeds may grow tax-free
- Avoid capital gains tax when donating securities and other long-term assets
- Avoid estate taxes on contributed assets
- Avoid Alternative Minimum Tax, if applicable
- Deduct full fair market value on taxes
- Bunch contributions for an easy tax planning strategy

IT'S FLEXIBLE

- Select investment options to suit risk preference
- Recommend grants when convenient, now or at a later date
- No minimum payouts or giving deadlines required
- Make changes without attorneys or CPAs
- Choose to be recognized or anonymous with each grant
- Complement other giving options

If you have any questions or would like more information, please reach out to your financial advisor or Lara Agatstein at Lara@ujf.org.