



### How The Jewish Community Foundation Can Help

The Foundation can help navigate through discussions of charitable giving, meet with advisors and their clients to help clarify personal philanthropic goals, facilitate family meetings about giving, or discuss complicated gifts. We also provide:

- Education on charitable giving vehicles
- Flexibility and tax advantages that may surpass those of private foundations
- Efficient, responsive, individualized service
- The option to give anonymously
- Information on emerging and emergency community needs

Greg Marcus, *Chair*

Caren B. Goldberg, *Milwaukee Jewish Federation Chief Development Officer  
& Executive Director of the Jewish Community Foundation*

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## Jewish Community Foundation FACTS & FIGURES 2018

The Jewish Community Foundation of the Milwaukee Jewish Federation was created in 1973 to meet the philanthropic needs of the Milwaukee Jewish Community. For more than 45 years the Foundation has served as the central address for the charitable and estate-planning activities of hundreds of members of our community. The Foundation works in partnership with our donors and their professional advisors who are providing a proud legacy of compassion, generosity and Jewish values that will serve our community for many generations to come.



## THE FUNDS of the JEWISH COMMUNITY FOUNDATION

**Endowment Funds:** Donors who establish an endowment fund provide a permanent gift to support the organizations they care about in perpetuity. Once established, these funds generate a steady source of income for operating expenses, program support or other needs. Types of endowment funds include unrestricted funds, scholarship funds, designated funds, agency, synagogue and day school funds.

**Donor Advised Funds:** One of the most appealing philanthropic vehicles, a donor advised fund enables the donors to recommend grants based on their personal interests and charitable objectives. These funds offer tremendous tax benefits, ease and convenience, and great flexibility in gift planning.

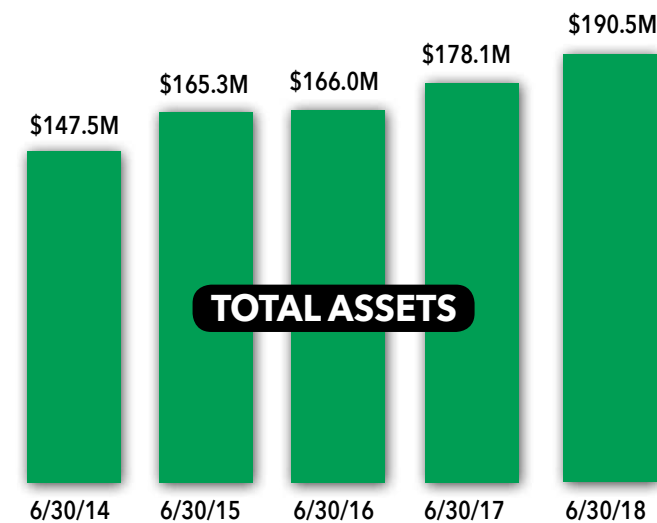
**Charitable Trusts:** A charitable remainder trust is a gift that pays income to one or more beneficiaries throughout the donors' lives or for a set term of years. Once the income payments are complete, the remainder interest is distributed to the charities designated by the donors. A charitable lead trust is established by contributing an income-generating asset. This trust exists for a specific term, pays an annual amount to the designated charity until the end of the term, and then the assets are transferred to the next generation.

### Types of Gifts

- Outright gift of cash, stocks or other assets
- Bequest in a will or trust
- IRA or other retirement plan
- Life insurance policy
- Charitable trusts

## FINANCIAL HIGHLIGHTS (6/30/18)

Total Assets (6/30/18)	<b>\$190,506,808</b>
Contributions (FY 2018)	<b>\$17,236,503</b>
Grants (FY 2018)	<b>\$10,989,136</b>
Number of Funds	<b>871</b>
Number of Grants	<b>4,118</b>
Number of Charities Supported	<b>1,057</b>



## GRANTS & DISTRIBUTIONS

