

Today. Tomorrow. Always.

DONOR ADVISED FUNDS



MILWAUKEE
JEWISH FEDERATION

Make philanthropy more convenient and enjoy potential tax benefits

Donor Advised Funds make charitable giving easy and even more enjoyable. You can open a fund with as little as \$2,500, immediately be eligible for a tax deduction, and then recommend grants to charitable organizations at your convenience.

Benefits of Donor Advised Funds

1. Donor Advised Funds have the convenience of a philanthropic checkbook.
2. The Foundation does the recordkeeping so you don't have to.
3. Easy online access to your Fund allows you to make charitable grant recommendations.
4. Receive potential tax advantages based on how and when you donate.
5. Your charitable dollars are invested until they are granted and can grow in size.
6. You can donate appreciated assets (like stocks) to increase tax benefits.
7. Holding your fund at the Jewish Community Foundation supports the Jewish community.

To learn more, contact Mitch Moser at 414-390-5718 or MitchM@MilwaukeeJewish.org.

*Our Donor Advised Fund serves as an
invitation to think bigger,
and into the future, about what's possible.*

Stephanie and Mark Goldstein

