The CENTER for JEWISH PHILANTHROPY

DONOR ADVISED FUNDS
Opening a Donor Advised Fund at the Jewish United Fund/Jewish Federation of Chicago is one of the most effective ways to achieve your unique philanthropic vision and ensure that your charitable dollars have maximum impact.

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund is a charitable giving account that makes it easier for you to plan, manage, and maximize your personal philanthropy. A Donor Advised Fund allows you to take advantage of high tax deductions, provides assets real potential for growth, and simplifies your charitable giving with our highly competitive fees.

WHY OPEN A DONOR ADVISED FUND?

SIMPPLY YOUR PHILANTHROPY

It is easy for you to support numerous charities in the Jewish and general communities through a Donor Advised Fund. Instead of writing multiple checks during the year, you recommend the grants you want to make to your charities of choice, and we do the rest. JUF/Federation provides you with regular financial statements—and you can manage your giving from the comfort of your home.

EXPERTISE AT YOUR SERVICE

As a mission-driven organization, JUF/Federation is committed to bettering the community. With our program open for more than 50 years, our professionals have extensive expertise surrounding funding opportunities, policy issues, tax implications, and more. We offer one-on-one guidance and will be pleased to explore charitable gift planning opportunities tailored to your individual needs, interests and philanthropic goals.

MAXIMIZE YOUR IMPACT... AND YOUR TAX BENEFITS

When you establish or add to your Donor Advised Fund, you qualify for an immediate tax deduction for a contribution to a public charity. If you contribute appreciated securities you’ve held for at least a year, you bypass capital gains taxes and receive a charitable deduction for that year. You can manage your tax savings by making contributions of cash or appreciated securities to your Donor Advised Fund in the year you most need a tax deduction, and later decide which charities you may wish to support. In addition, assets in a donor advised fund can grow tax free, building your fund and giving you the chance to make an even bigger impact.

HOW DOES A DONOR ADVISED FUND WORK?

GIVE $1,000 or more to establish your Donor Advised Fund at the Jewish United Fund/Jewish Federation of Chicago. With your fund you can:

• Establish your Donor Advised Fund with cash, stock, or other appreciated assets
• Launch your fund in your own name, in honor or memory of a loved one or to celebrate a life event
• Add to your fund any time and earn additional tax deductions

ADVISE how to invest the assets among investment options for potential tax-free growth. These include:

• The Jewish Federation Pooled Endowment Portfolio
• Money market fund
• A variety of mutual funds
• State of Israel bonds

SUPPORT your favorite charities from your Donor Advised Fund by recommending grants through our secure online portal. You can:

• Recommend a specific purpose for a grant
• Set up recurring grants to any charities you may wish to support regularly
• Designate grants as anonymous

Open your Donor Advised Fund today! Our legacy giving professionals will be pleased to assist you in realizing your philanthropic aspirations.

To learn more about opening a Donor Advised Fund, or one of the many other ways you can create your legacy, contact us at legacy@juf.org or 312-357-4853, or visit jufplannedgiving.org.
JUF/Federation amplifies our collective strength to make the world a better place — for everyone.

Community powered, we consider the totality of local and global Jewish needs and how to address them. From generation to generation, we help people connect to Jewish life and values, fueling a dynamic, enduring community that comes together for good.