

DONOR ADVISED FUNDS

A Donor Advised Fund allows you to manage your philanthropic giving. You can recommend grant distributions to your choice of a large number of qualified charitable organizations.

AT-A-GLANCE

- Fund may be created with a minimum of \$10,000
- Allows you to recommend grants to qualified organizations
- Offers considerable tax advantages
- Less burdensome and less expensive than operating a private foundation
- A thoughtful way to continue your support of the Jewish community



Jewish Foundation

UJA Federation of Greater Toronto



A Donor Advised Fund allows you to set aside tax-deductible dollars now and enjoy growth for future philanthropy. Your fund creates a formally structured vehicle for charitable giving and enables you to recommend which initiatives and organizations will benefit from your donation.

A Donor Advised Fund provides the advantages of a private foundation while eliminating ongoing legal, accounting and costly administrative expenses.

Easy to open, a Donor Advised Fund offers significant financial and tax benefits, and simplifies future giving. With as little as \$10,000, it can be established through a gift of cash, appreciated securities, capital property or private company shares. The cash, or the proceeds from the sale of securities or other capital property, are invested with the Jewish Foundation of Greater Toronto's investment portfolio.

The Foundation administers the fund, writes all cheques and makes distributions in the fund's name, or anonymously if you prefer. You are sent statements reflecting the income earned, distributions made, and current balance of your fund.

The assets of the Donor Advised Fund grow tax free. Since the fund is a component fund of the Foundation, all gifts are considered gifts to a public charity, qualifying for all the favourable tax rules which apply to public charities.

BENEFITS

- You can make annual recommendations to your charities of choice.
- You can create or add to your fund with tax-free gifts of cash or appreciated securities.
- You get an income tax deduction for the full value of your gift.
- You are provided a receipt at the time of your initial gift, as well as for any subsequent gifts.
- You, or anyone else, can add to your fund at any time.

CALL 416-631-5703 TODAY

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