



Ways to Compare Donor-Advised Funds

Donor-advised funds have been part of the landscape of American philanthropy for many years and are available from a number of sources: community foundations, commercial charitable gift funds, and independent public foundations like the Jewish Communal Fund. Although many donor-advised funds share similarities, they also offer distinct differences. It is important to find the donor-advised fund that is right for you. Below are questions that you may wish to consider when comparing donor-advised funds.

To learn more about the differences between the Jewish Communal Fund and other donor-advised funds, please call us toll-free at 1-866-580-4523, ext. 13, and ask for Abby Tucker, VP of Marketing and Donor Relations.

costs

- What is the annual administrative fee?
- What are the investment management fees?
- Are there additional fees (e.g., a processing fee for grants beyond a certain limit, a load, or a commission to the broker establishing the account)?

investments

- How wide is the choice of investment options?
- What has been the performance of these investments?
- What is the net rate of return after fees?

contributions

- What types of assets are eligible for contribution other than cash and marketable securities, e.g., closely-held securities, real estate, art, life insurance, interests in limited partnerships and limited liability companies?
- What is the minimum amount required to establish a fund?
- Is there a minimum amount required for additional contributions?

distributions

- What is the minimum grant amount?
- Is there a minimum annual distribution requirement?
- Are there restrictions on distributions?
- How quickly are grant recommendations processed?

succession planning

- What are the provisions for succession upon the death of the donor?
- Can the donor provide a list of charities?
- Can the fund continue in perpetuity?

other

- Can I access my fund online?
- Does the donor-advised fund provide philanthropic advisory services?
- Are group funds permitted (such as Memorial funds, Bar or Bat Mitzvah funds, Children's Giving funds, Young Adult Funds, or other funds where anyone can contribute to the fund by credit card or check)?
- What do other professional advisors say about the program?

Founded in 1972, JCF is one of the largest independent donor-advised funds in the nation. For the fourth consecutive year, JCF has received a 4-star rating from Charity Navigator.

FOR MORE INFORMATION,
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