

Five Ways to Diversify Your Legacy Using the Jewish Communal Fund

A donor-advised fund is an efficient way to ensure that a range of charities your clients care about will be supported for years to come. It is also a meaningful way to involve family members in the joys of charitable giving.

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

FOR MORE INFORMATION,
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www.jewishcommunalfund.org

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1 Establish

a donor-advised fund during your lifetime to simplify your charitable giving and reduce both your current tax liability and taxable estate. Create a succession plan for your fund that names family members to succeed you. You may also provide a list of IRS-qualified public charities that you recommend receive annual donations from your fund in perpetuity.

2 Name

your donor-advised fund as the beneficiary of your IRA or qualified retirement plan on the plan beneficiary designation form (not in your will).

3 Make

a charitable bequest in your Last Will and Testament to establish a donor-advised fund upon your death.

4 Designate

your donor-advised fund as the Remainderman of a Charitable Remainder Trust and provide a list of IRS-qualified public charities that you recommend receive annual donations from your fund in perpetuity.

5 Transfer

your philanthropic values to your children and grandchildren by establishing funds for them to advise now or through your will. A fund for children under the age of 31 can be established with an initial gift of \$1,800.

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FUND Your **personal connection**
to charitable giving®